



## **User Guide for PaperSave 7.0 for Blackbaud CRM**

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# Introduction to PaperSave

PaperSave is a complete document management software for Microsoft Dynamics, Microsoft Dynamics 365, Blackbaud, Sage Intacct, and Paramount WorkPlace Enterprise. PaperSave's unique integration provides one-click access to documents related to the records within Microsoft Dynamics solutions like GP, SL, and CRM, Microsoft Dynamics 365 solutions like Business Central and Finance, Blackbaud solutions like Raiser's Edge (RE & RE NXT), Financial Edge (FE & FE NXT), Blackbaud CRM, Sage Intacct Cloud Accounting Software and Paramount WorkPlace Enterprise and Paramount WorkPlace for GP.

PaperSave combines document capture and transaction processing to eliminate multiple steps from your process saving time and money!

Going paperless offers many benefits. In addition to being environmentally friendly, it drives organizations towards operational efficiency by eliminating the time required to file, search, and retrieve documents. PaperSave delivers a complete, secure Document Management, Electronic Workflow, and Invoice Automation solution without the inherent inefficiencies and risk of loss associated with traditional paper processes.

## Key Benefits:

- Boost productivity by eliminating the 20-30% of time spent filing, searching, and retrieving documents through our seamless integration with Dynamics, Dynamics 365, Blackbaud solutions, Sage Intacct and Paramount WorkPlace Enterprise.
- Sharing Information across multiple locations.
- Increased security and compliance with user and group roles.
- Quick search and retrieval through multiple methods such as drill down from the source record/transaction, Query/Smart List integration, Content Search, Meta-Data Search.
- Reclaim Office space by eliminating filing cabinets and off-site storage.
- Enhance your "Green" efforts by reducing your paper usage.
- Improve Customer Service by having access to vital documents at your fingertips.

- Faster Monthly Closes
- Reduce time filing and retrieving documents.
- No more lost or misfiled documents.
- Automated record retention rules.
- Enhanced disaster recovery
- Quick ROI and many more!

PaperSave provides instantaneous on-screen access to any image or document associated with each transaction without stopping your current process or searching through mounds of papers. It is a single-step solution for all your paper filing needs. PaperSave simplifies the effort of storing a document without affecting day-to-day activities. The PaperSave application is designed to virtually eliminate costly paper filing and improve efficiency. With PaperSave, documents can be instantly retrieved and displayed on your screen within the security measures implemented in your information system.

## Solutions offered by PaperSave

PaperSave offers following solutions in order to streamline your businesses:

- Document Management
- Document Capture Methods
- Document Search Features
- Electronic Workflow
- Transaction Automation with OCR (Optical Character Recognition)

The various features offered by PaperSave are explained briefly as follows:

## **DOCUMENT MANAGEMENT**

Document Management eliminates 20% to 30% of time spent filing, searching & retrieving documents. An all-in-one document management software PaperSave, acts as a central repository for all documents (paper or digital), storing them in easy-to-access electronic formats. PaperSave reduces the need for manual data entry, removes multiple steps from document management processes and effectively saves businesses time and money. PaperSave can collect documents from anywhere, ensuring that it meets every business's needs. PaperSave document management software integrates with everything from ERP and CRM; as well as Microsoft solutions such as Outlook and Office.

## **DOCUMENT CAPTURE METHODS**

PaperSave offers so many ways to capture the documents, whether you are capturing documents from a desktop scanner, network copier/scanner, fax machine, email or Microsoft Office®, PaperSave's Electronic Document Imaging allows you to capture documents based on your preference, process and hardware available. The numerous acquisition methods are listed below.

### **1) Scanned Images**

#### **a. *ScanNow™***

Scan Documents directly to records right from the desktop. One click!

#### **b. *ScanLater™***

Scan documents in stacks and let PaperSave do the work. PaperSave will read the ScanLater barcode and automatically match the physical document to the corresponding record or transaction.

#### **c. *Forms Recapture***

Capture documents produced by host system like AP Checks, packaging slips, bill of lading, etc.

### **2) Electronic Documents**

#### **a. *Outlook Integration***

Capture email and attachments and seamlessly enter them into a workflow or associate with an existing record in the system. All from a click of your toolbar within Outlook.

### **b. *Microsoft Office Integration***

Whether it is a PowerPoint®, Word® or Excel® document you've received or created, seamlessly add it to a record, or enter it into the workflow from your toolbar.

### **c. *Drag and Drop***

"Grab" a document from Outlook, file manager, or your desktop and drop it into PaperSave or a workflow to automatically associate it with a record or transaction.

### **d. *File Management***

Simply right click from any supported file type and be able to add document seamlessly into PaperSave.

### **e. *Attach a Document***

Browser out to your computer or a network folder to grab a copy of a document.

### **f. *PaperSave Printer***

Print directly into PaperSave using the PaperSave printer driver to capture, index, and store documents.

## **DOCUMENT SEARCH METHODS**

PaperSave offers powerful ways to search and retrieve a document added to PaperSave.

1) **Documents (Simple):** Internet search engines such as "Google" or "Bing" search webpages for "keywords" or "values". PaperSave performs similar unstructured searches on Record Values (metadata), Document Profile Fields (user-defined metadata) and, the Content\* of the document.

2) **Documents (Advanced):** PaperSave makes even advanced search queries of documents simple. Easily create Structured Queries based on Record Information, Profile Information (user-defined metadata), and Content without needing any technical skills. Documents results can then be filtered using Boolean (And/Or) logic, sorted, exported, emailed, or printed from your desktop.

3) **Integrated App Record Search:** PaperSave allows you to search for integrated application records for a specific integrated application instance, view the documents associated with one or more records, and add new documents to one or more integrated app records using the various File capture methods. You may narrow down the search results by selecting the module name and the search criteria (For Example, "city", "ID", etc.).

## **ELECTRONIC WORKFLOW**

PaperSave's Electronic Workflow Solution automates workflows and streamlines operations by reducing the need to manage traditional paper-based processes. This ensures that all mission-critical information, documents, and transactional data are automatically collected and stored.

## **TRANSACTION AUTOMATION WITH OCR\***

PaperSave allows businesses and associations to streamline data entry and collection from start to finish, making PaperSave ideal for the most demanding high-volume, high-complexity IT environments that require secure management of process supporting documents. PaperSave's OCR Engine learns how to collect data from business documents, ensuring that new invoice formats are always supported.

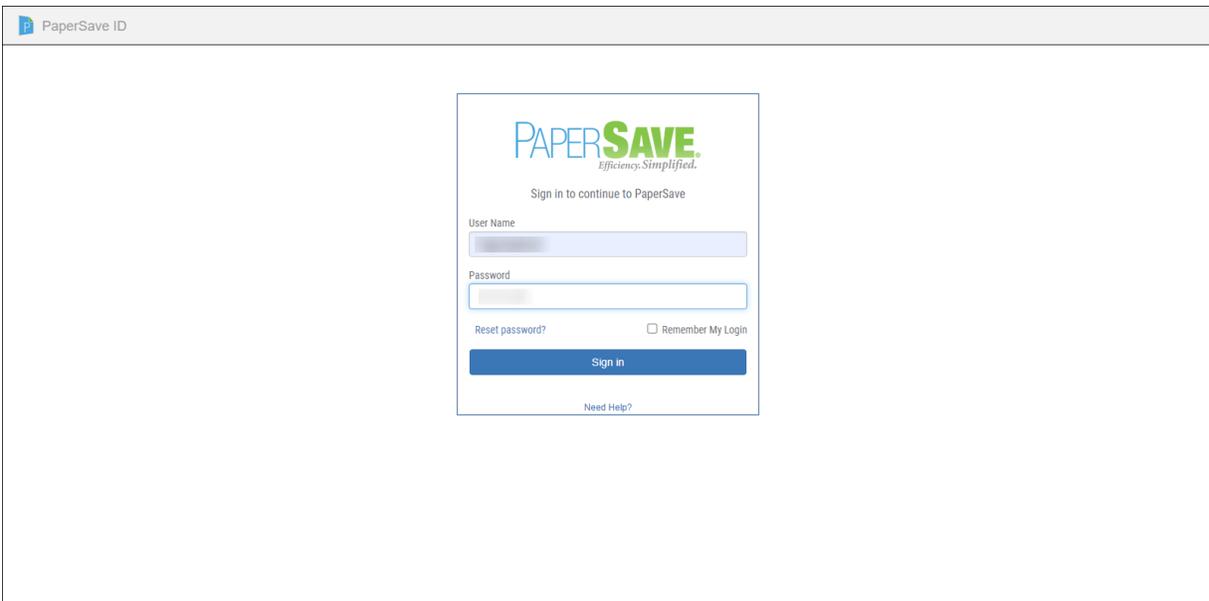
**Note:** OCR\*- Optical Character Recognition

## **Log in to PaperSave**

This section describes how to access PaperSave application. You can access PaperSave application using Supported Browsers.

To log in to PaperSave:

- 1) Open your web browser and type the PaperSave URL and press **Enter** key.
- 2) PaperSave log in screen appears. Enter your credentials to log in to PaperSave.
  - a) **User Name** - Enter your user name to log in to PaperSave.
  - b) **Password** - Enter your user password to log in to PaperSave.
  - c) **Remember My Login** - Select this option if you want PaperSave to remember your log in username and password. PaperSave will remember your log in details and will log you in automatically in PaperSave.
  - d) Click on the **Sign in** button to sign to PaperSave.
- e) **Reset Password**- If you want to reset the password, then click on "Reset password?" to reset the password. An email containing the password reset link will be sent to your registered email address from where you can reset the password.



PaperSave ID

**PAPER SAVE.**  
*Efficiency Simplified.*

Sign in to continue to PaperSave

User Name

Password

[Reset password?](#)  Remember My Login

[Sign in](#)

[Need Help?](#)

# Supported Browsers and Operating Systems

Supported Browsers*	Supported Operating system
Google Chrome	<p data-bbox="967 464 1110 491"><b>Windows</b></p> <ul data-bbox="695 541 1430 884" style="list-style-type: none"><li data-bbox="695 541 1430 632">• Windows 8 Professional, Ultimate, Enterprise, Business (32-bit and 64-bit).</li><li data-bbox="695 663 1430 753">• Windows 8.1 Professional, Ultimate, Enterprise, Business (32-bit and 64-bit).</li><li data-bbox="695 785 1013 812">• Windows 10 (64-bit)</li><li data-bbox="695 844 1013 871">• Windows 11 (64-bit)</li></ul> <p data-bbox="1013 930 1073 957"><b>Mac</b></p> <ul data-bbox="695 1008 1062 1035" style="list-style-type: none"><li data-bbox="695 1008 1062 1035">• macOS 10.14 and above</li></ul>

**Minimum Supported Resolution:** 1600 x 900

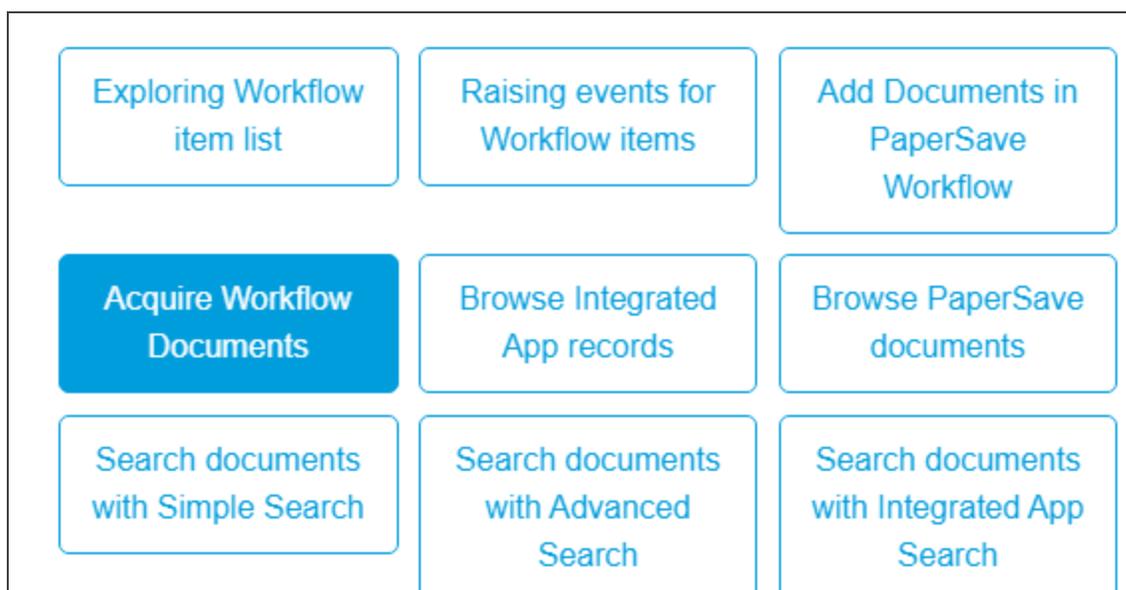
\* signifies that PaperSave7 should work on all modern browsers like Chrome, Chromium Edge, Firefox, Safari, and Opera. However, we have only verified on Chrome for now. Feel free to try PaperSave in browsers other than Chrome and let us know if you find issues. While we only officially support Chrome, we will accept your feedback as we work toward broader browser support.

## How to use this Guide ?

This section provides information to assist you in using this Guide most effectively. It includes various navigation options such as switching to another topic within the User Guide, accessing other links, sub-topics and quick links, using breadcrumbs.

### Home page Quick Links

Access the most popular sections in the User Guide from the Quick Links tile in the User Guide Home page as shown below:

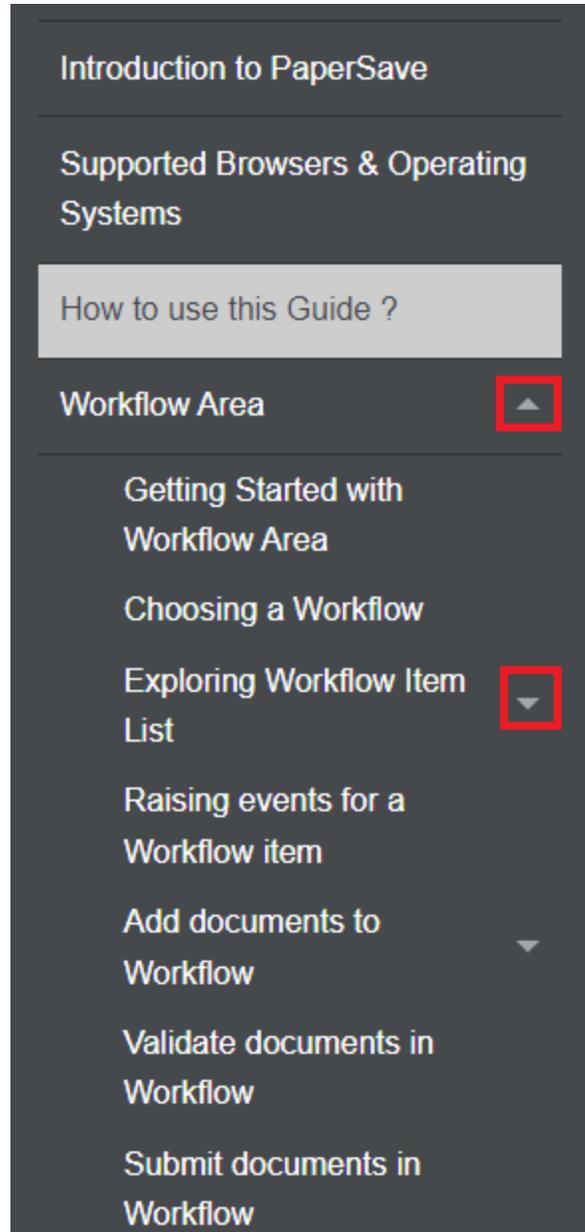


### User Guide Navigation Menu

Navigate to the desired section in the User Guide from Navigation menu in the left hand as shown below:

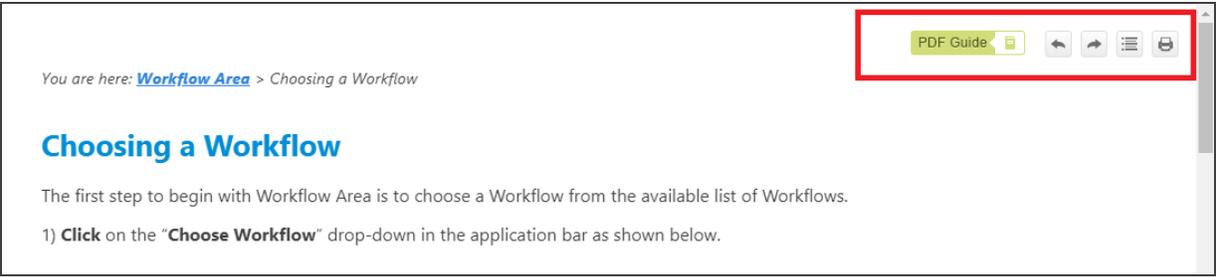
User guide for PaperSave 7.0
Introduction to PaperSave
Supported Browsers & Operating Systems
How to use this Guide ?
Workflow Area ▼
Acquire Area ▼
Browse Area ▼
Search Area ▼
Configuration Area ▼
Appendix ▼

- Explore the Sub-topics within the main topics using Arrows as shown in the below screen. Click on the **Up** arrow to collapse the sub-topics and the **Down** arrow to expand the sub-topics.



## Other Links

Access other links given on the Page toolbar in the User Guide as shown below:



The following is the description of the various options in the other links toolbar:

Options	Description
	Click on this icon to access the PDF version of the User Guide.
	Click on this icon to access the Previous topic in the User Guide.
	Click on this icon to access the Next topic in the User Guide.
	Click on this icon to collapse the sub-topics in the page.
	Click on this icon to access print the current page.

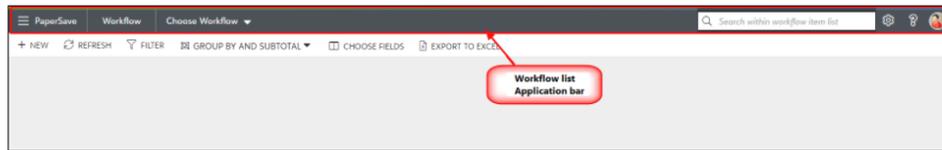
## Using Breadcrumbs

Access the sub-topics under the selected main topic in the User Guide from the breadcrumbs menu as shown in the below screen:

You are here: [Workflow Area](#) > [Exploring Workflow Item List](#) > Application Bar in Workflow Item List

## Application Bar in Workflow item list

The Workflow Area presents an Application bar in the Workflow item list as shown below:

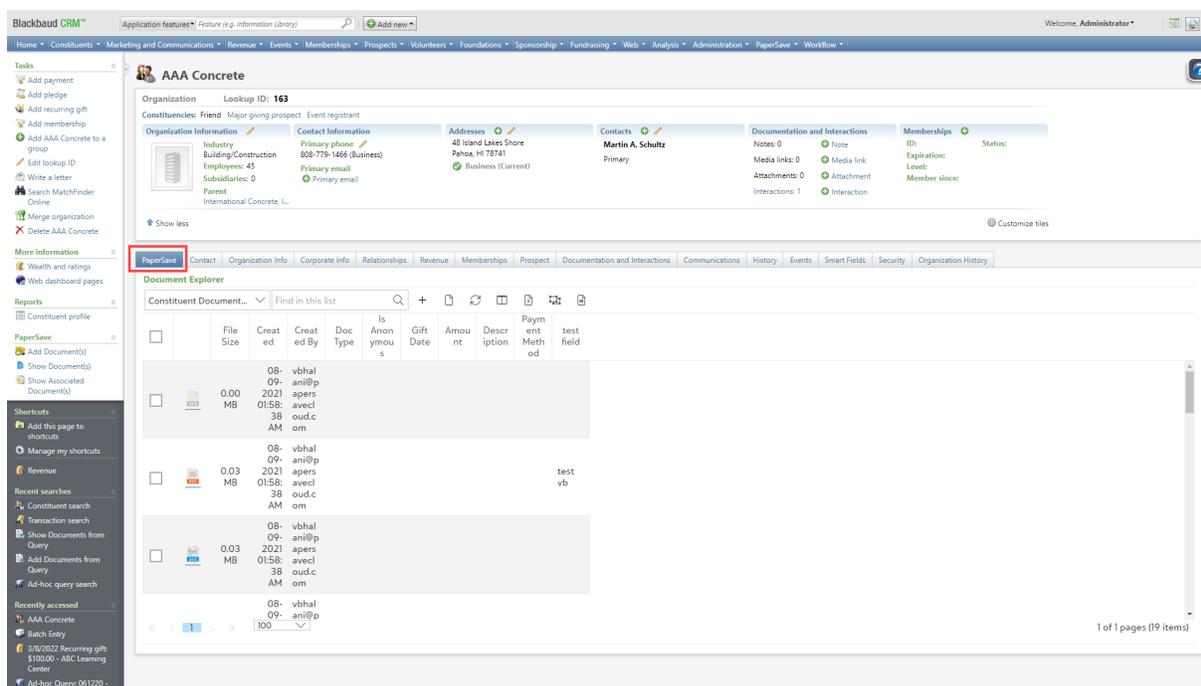


# PaperSave Integration within Blackbaud CRM

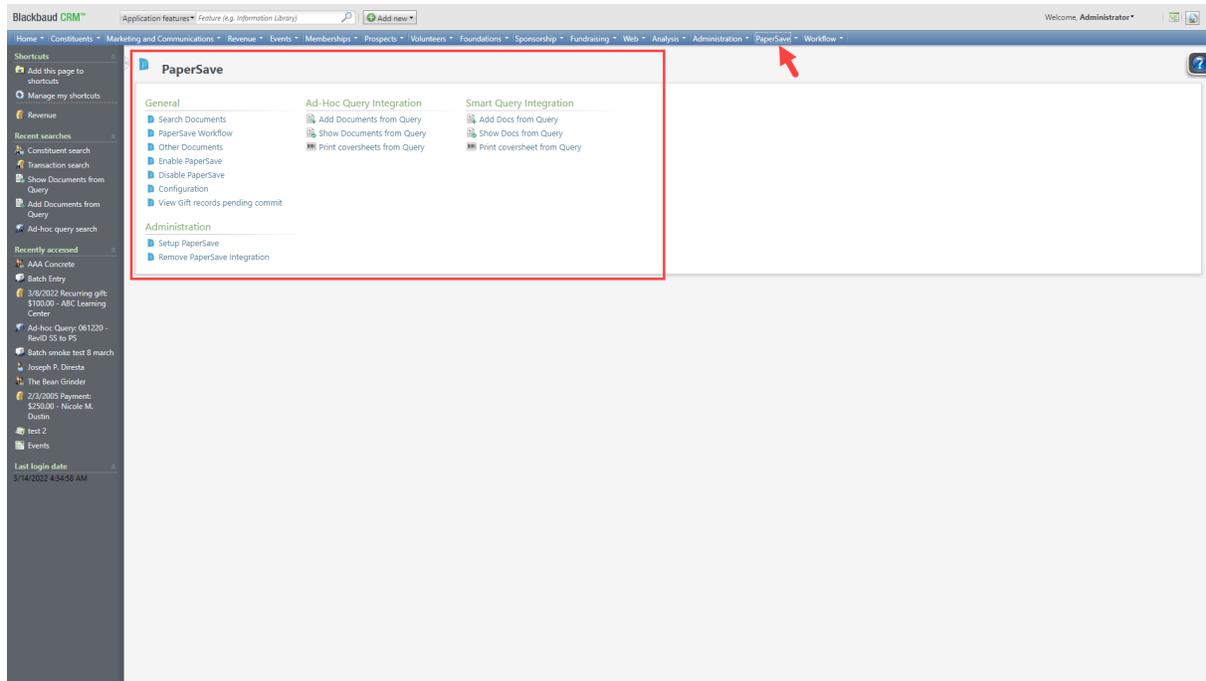
PaperSave offers an integrated document management solution seamlessly integrated with the Blackbaud CRM so that documents can be electronically added and retrieved by while eliminating time from your busy workday. PaperSave dynamically captures information from the supporting CRM record types and stores it as meta-data with the supporting document in the PaperSave database. This allows documents to be retrieved within a click or two from the CRM record.

PaperSave provides the following functionalities on successful integration with Blackbaud CRM:

**PaperSave Minified Document Explorer:** When you open any record within the PaperSave supported record type, PaperSave tab appears as shown below. Click [here](#) to know more.



**PaperSave Customized Menu within Blackbaud CRM:** In Blackbaud CRM, a separate PaperSave section is available as shown below which consist of various PaperSave options such as Enable/Disable PaperSave, Add/Show/Print Coversheets from Query, Setup PaperSave, Remove PaperSave integration, etc. Click [here](#) to know more.



**Batch Integration plug-in for Blackbaud CRM:** To add PaperSave add and show document option within Revenue batch, PaperSave provides you a plug-in which on enabling you can access PaperSave's option from the action pane of the uncommitted batch dialog box and from PaperSave tab which open the dialog box as shown below. Click [here](#) to know more.

Batch 356

Main Revenue PaperSave

Batch Revenue PaperSave

Constituent Solicit codes Edit Go to Properties Custom fields Configuration Update projected totals Processes Validate Update projected totals Messages Clear row message Set row message Clear all Show all Select previous Select next Filter... PaperSave Add Document Show Document

Properties

Owner: Administrator Projected No.: 10 Current No.: 1  
Projected total: 1,000,000.00 Current total: 100,000.00

Constituent	Lookup ID	Amount	Date	Inbound channel	GL post date	Revenue type	Receipt type	Payment method	Application	Reference	Designation	GL post status
1	13MayComJAT11	8-10000914	\$100.00	2/14/2022		2/14/2022	Payment	Per payment	Cash	Recurring gift for 13May...		Not posted

Constituent Window

Page 1 of 1

https://hrtest51ha.test.paperdrive.com:448/ibAppFxi/webui/webshell/page.aspx?databaseName=88CRM999821# amount: \$1,000.00

Batch 356

Main Revenue PaperSave

PaperSave PaperSave

Properties

Owner: Administrator Projected No.: 10 Current No.: 1  
Projected total: 1,000,000.00 Current total: 100,000.00

Constituent	Lookup ID	Amount	Date	Inbound channel	GL post date	Revenue type	Receipt type	Payment method	Application	Reference	Designation	GL post status
1	13MayComJAT11	8-10000914	\$100.00	2/14/2022		2/14/2022	Payment	Per payment	Cash	Recurring gift for 13May...		Not posted

Constituent Window

Page 1 of 1

https://hrtest51ha.test.paperdrive.com:448/ibAppFxi/webui/webshell/page.aspx?databaseName=88CRM999821# amount: \$1,000.00

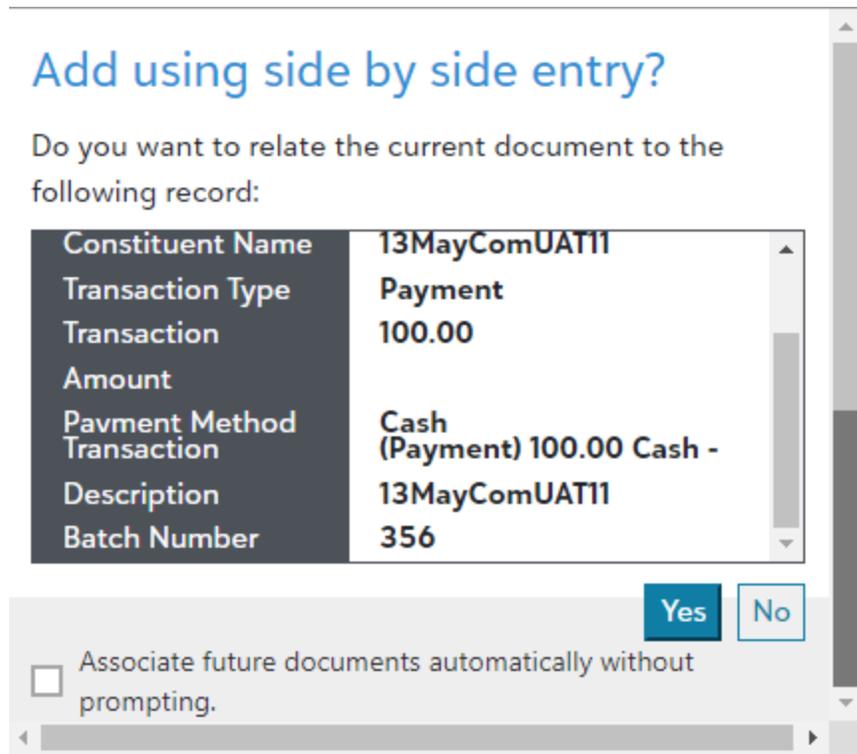
PaperSave

Add a Document to the Batch Row

Show Documents related to the Batch Row

OK Cancel

**Side by Side Entry:** You can easily associate the documents with open Blackbaud CRM record or Revenue batch from a PaperSave Workflow with Side by Side Entry enabled. When you start Side by Side Entry from the PaperSave Workflow item viewer and select the PaperSave's Add document option from a Blackbaud CRM, a dialog box will appear as shown in the below screen. Click of **Yes** to add the PaperSave document directly to the Blackbaud CRM record.



**Note:** You can manage the Side by Side Entry options from the PaperSave's Settings menu.

Click [here](#) to learn more about Side by Side Entry.

# Access PaperSave within PaperSave supported record types

Follow the below steps to access the PaperSave within the records.

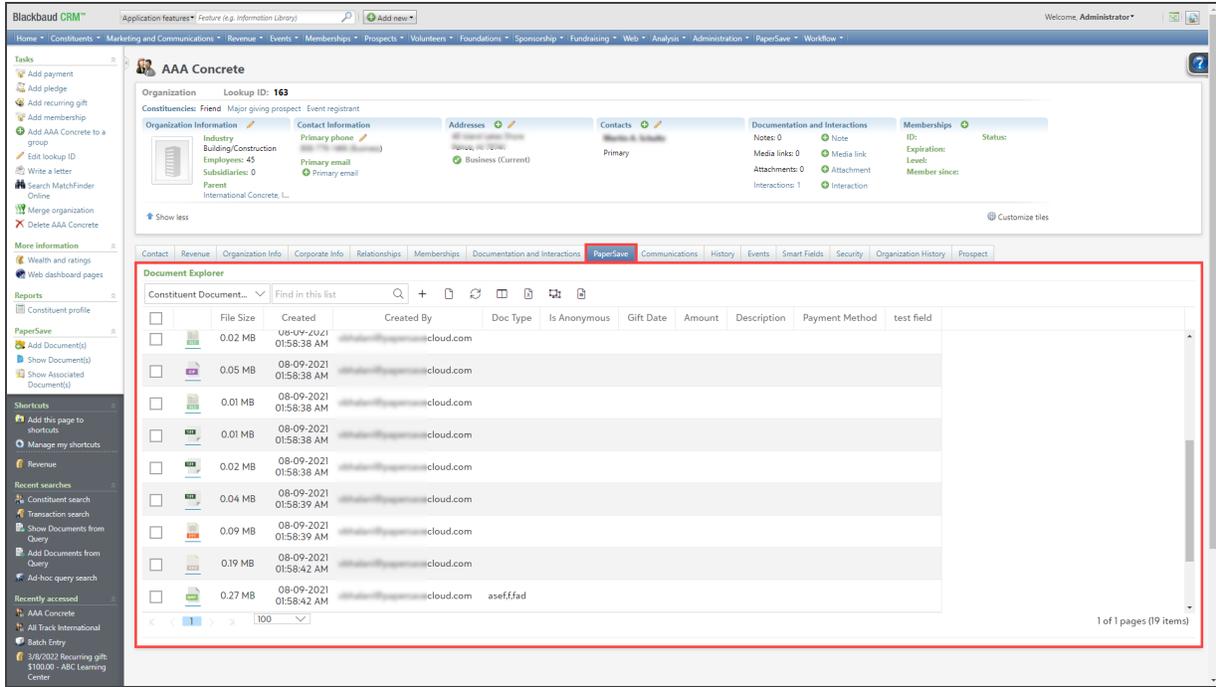
**Note:** Click [here](#) to view the list of PaperSave supported record types.

1) Login to Blackbaud CRM application, select the desired record type and open any record, as shown below.

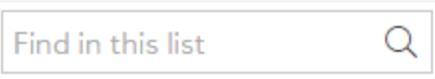
The screenshot displays the Blackbaud CRM interface for a record titled "AAA Concrete" (Lookup ID: 163). The interface includes a top navigation bar with various menu items like Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, Volunteers, Foundations, Sponsorship, Fundraising, Web, Analysis, Administration, PaperSave, and Workflow. A left sidebar contains navigation options such as Tasks, More Information, Reports, PaperSave, and Shortcuts. The main content area shows the record details for "AAA Concrete" with tabs for Contact, Revenue, Organization Info, Corporate Info, Relationships, Memberships, Documentation and Interactions, PaperSave, Communications, History, Events, Smart Fields, Security, Organization History, and Prospect. The "PaperSave" tab is currently selected, displaying a table of records. The table has columns for "Addresses (1)", "Phone numbers (1)", "Email addresses (0)", and "Social media accounts (0)". Each row in the table includes fields for "Contact information", "Type", "Primary", "Do not contact", "Start date", and "End date".

Addresses (1)	Phone numbers (1)	Email addresses (0)	Social media accounts (0)
Contact information	Contact information	Contact information	Contact information
Type	Type	Type	Type
Business (Current)	Business (Current)		Service
Yes	Yes		
Primary	Primary	Primary	Primary
Do not contact	Do not contact	Do not contact	Do not contact
Start date	Start date	Start date	Start date
End date	End date	End date	End date

2) Once the Records page opens, click on PaperSave tab to open PaperSave minified document explorer as shown below.



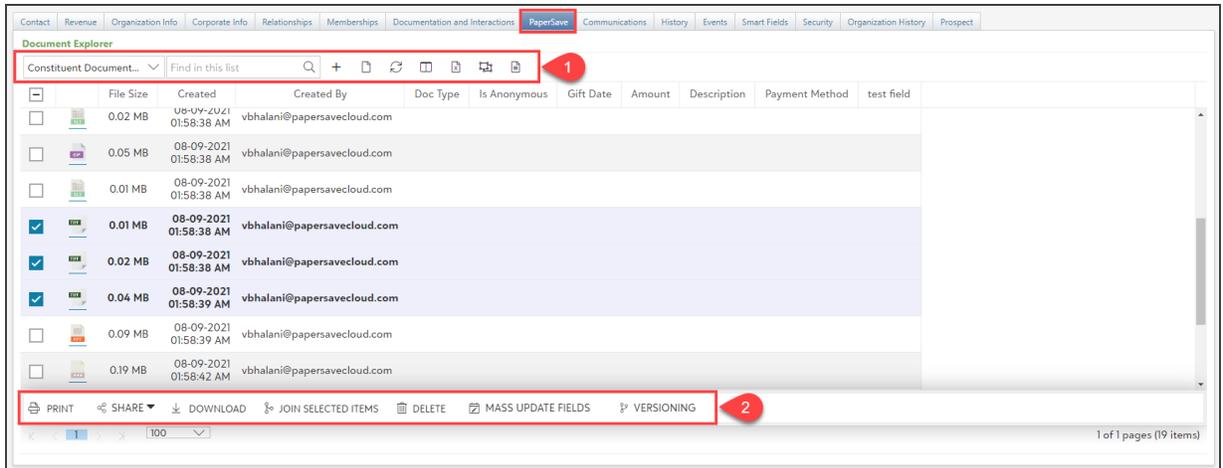
3) Now, in Document Explorer the following PaperSave options (**1- List toolbar** and **2- Slideup toolbar**) are available as shown in the following table and the image.

Options	Name	Description
<b>1- List Toolbar</b>		
	Choose Document Type	Document type drop down appears only when there are more than one document types configured for the selected record type.
	Quick Search	This search bar enables you to promptly find an item by using relevant

Options	Name	Description
		keyword(s) instead of browsing and scrolling across multiple items within the list. Click <a href="#">here</a> to know more.
	New	This option primarily enables you to add documents to the selected record via PaperSave.
	Open	This option opens the selected document in an item viewer.
	Refresh	This option updates the recent changes in the document list.
	Choose Fields	This option enables you to configure the desired columns to be displayed in the list. Click <a href="#">here</a> to know more.
	Export to Excel	This option allows you to export the PaperSave document list to an excel file. click <a href="#">here</a> to know more.
	Interrelated	This option allows you to view the respective interrelated documents.

Options	Name	Description
	Show Document List	This option redirects you to PaperSave document list where it displays the list of acquired document within the record.
<b>2- Slide-up Toolbar</b>		
	Print	This option enables you to print the selected document from the document list. Click <a href="#">here</a> to know more.
	Share	<p>You can share the selected documents from the list using any of the below options:</p> <ul style="list-style-type: none"> <li>• Email the document</li> <li>• Email the link of the document</li> <li>• Copy Link</li> </ul>
	Download	You can download the selected documents from the list. Click <a href="#">here</a> to know more.
	Join selected items	This option allows you to merge two or more

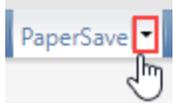
Options	Name	Description
 JOIN SELECTED ITEMS		documents of any image type (i.e. pdf, tiff, gif, jpg, bmp, etc.) from the list. Click <a href="#">here</a> to know more.
 DELETE	Delete	This option permanently discards the unnecessary document from the current list. Click <a href="#">here</a> to know more.
 MASS UPDATE FIELDS	Mass update fields	This option allows you to quickly change field value(s) directly from the document list, and create and apply a template.
 VERSIONING	Versioning	This option is used to control the changes made in different versions of the selected document.

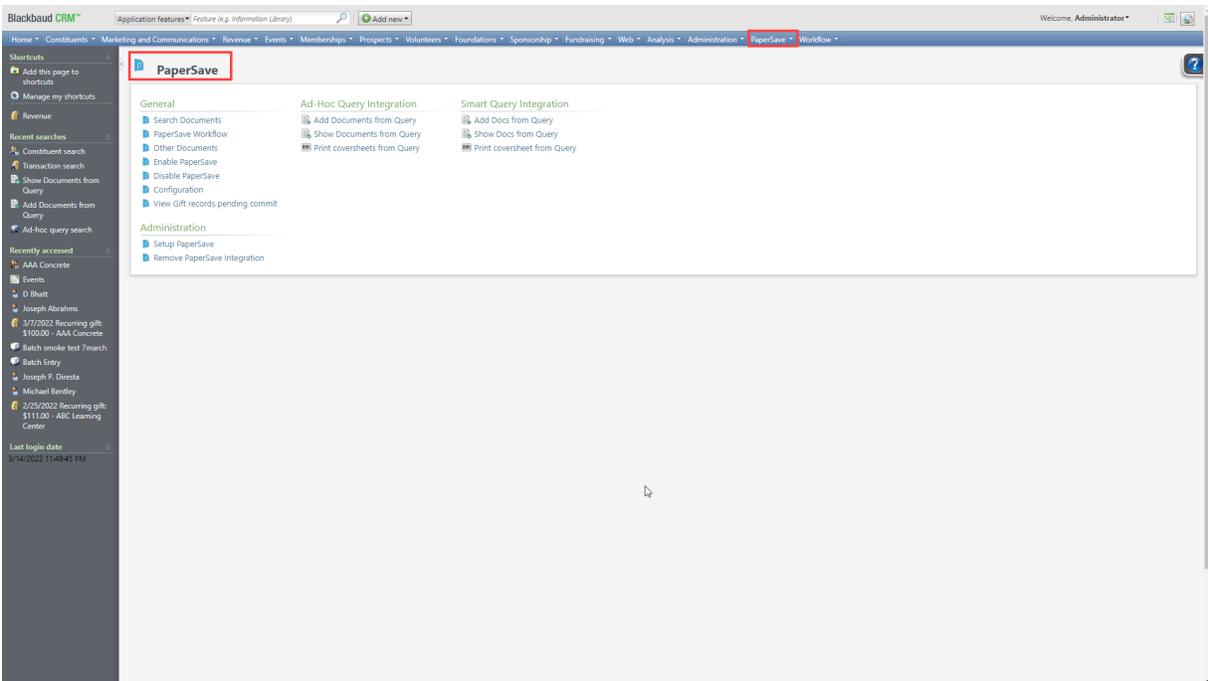


**Warning:** To access PaperSave options, you must first enable PaperSave from the PaperSave customized menu. Click [here](#) to view the steps to enable/disable PaperSave

# Access various PaperSave options

Follow the below steps to access various PaperSave options in the Blackbaud CRM:

1) Login to Blackbaud CRM and navigate to the toolbar to select PaperSave drop-down arrow  to view all the PaperSave options or to directly click on **PaperSave** to open all options in a new tab as shown below.



Now, click on the following links to further learn about the options available in PaperSave customized menu:

## General

- [Search Documents](#)
- [PaperSave Workflow](#)
- [Other Documents](#)

- [Enable/Disable PaperSave](#)
- [Configuration](#)
- [View Gift records pending commit](#)

## **Administration**

- [Setup PaperSave](#)
- [Remove PaperSave Integration](#)

## **Ad-Hoc Query Integration**

- [Add Documents from Query](#)
- [Show Documents from Query](#)
- [Print coversheets from Query](#)

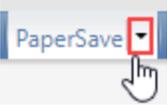
## **Smart Query Integration**

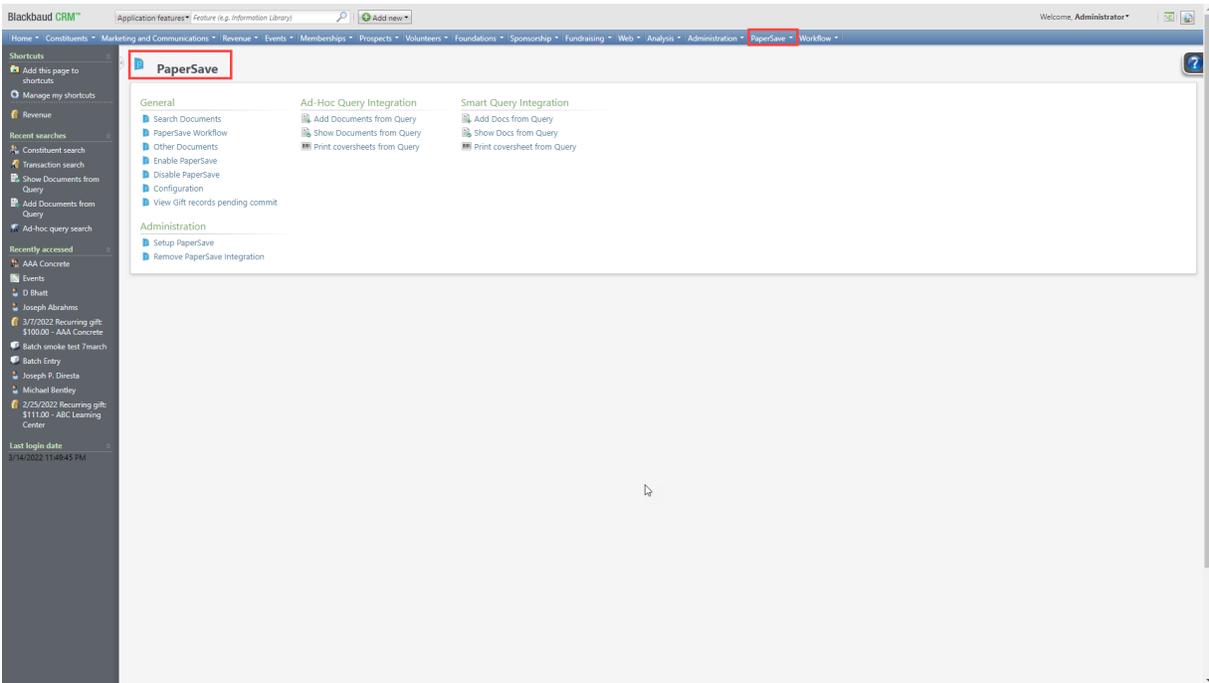
- [Add Docs from Query](#)
- [Show Docs from Query](#)
- [Print coversheet from Query](#)

# Search Documents

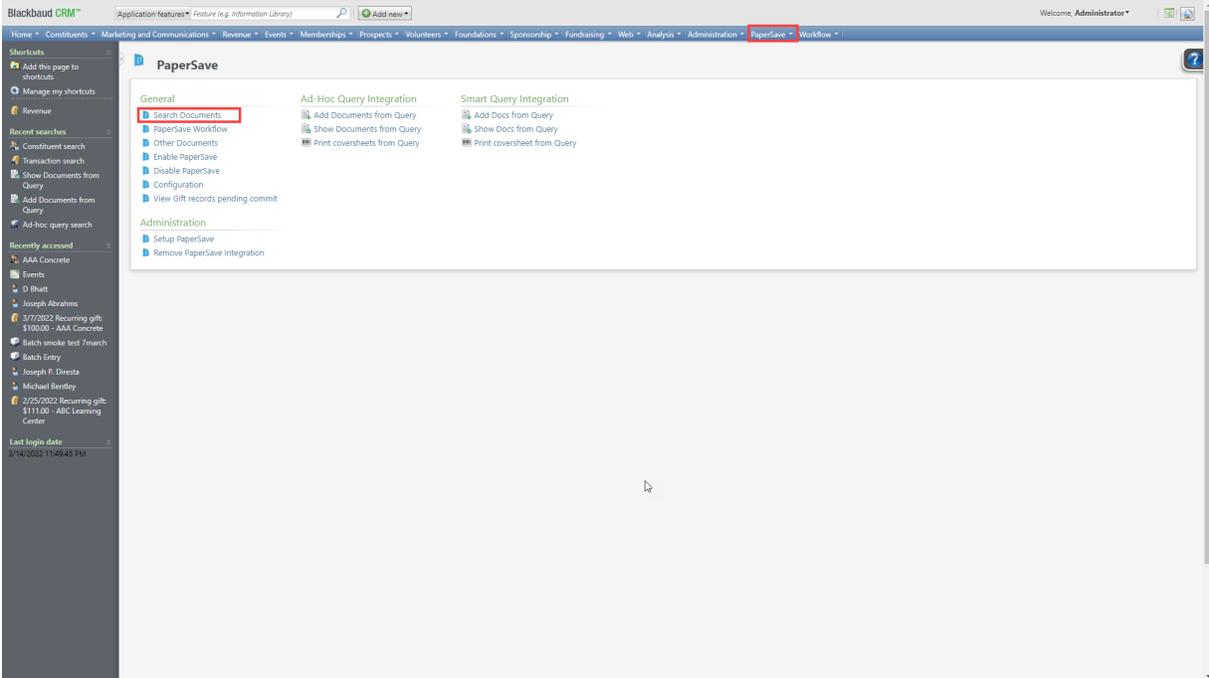
PaperSave provides you an option within the menu that allows you to search for documents associated with a Blackbaud CRM record.

Follow the below steps to perform a search for the documents within any PaperSave supported record type.

1) First, go to Blackbaud CRM toolbar and select PaperSave drop-down arrow  to view all the PaperSave options or directly click on **PaperSave** to open all options in a new tab as shown below.

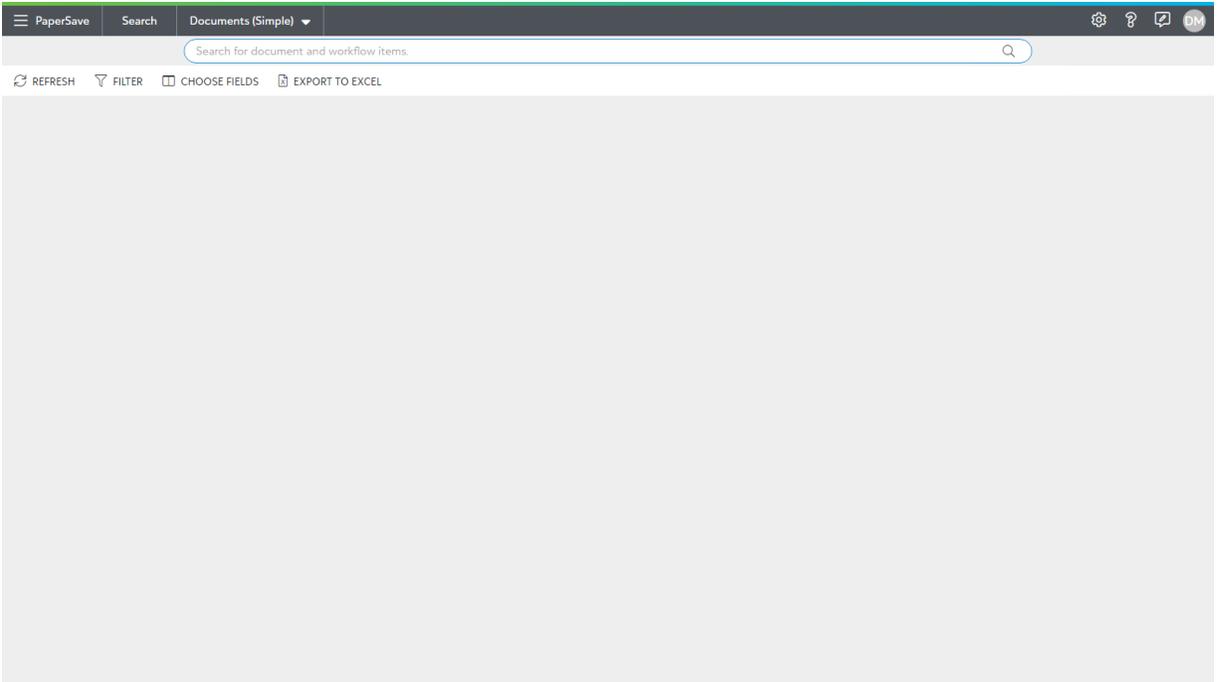


2) Now, click on the **Search Documents** option present in the General group as shown in the below screen:



**Warning:** You must enable PaperSave to access Search Documents and other PaperSave options. Click [here](#) to view the steps to enable/disable PaperSave.

3) You get redirected to the PaperSave Search Area in your default browser.



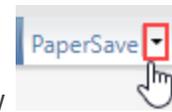
4) From the PaperSave Search Area, you can find the desired document by using the available search methods such as Simple search, Advanced Search or Integrated App (Blackbaud CRM) record search. Click [here](#) to know more about the different Search options.

# Open Workflow

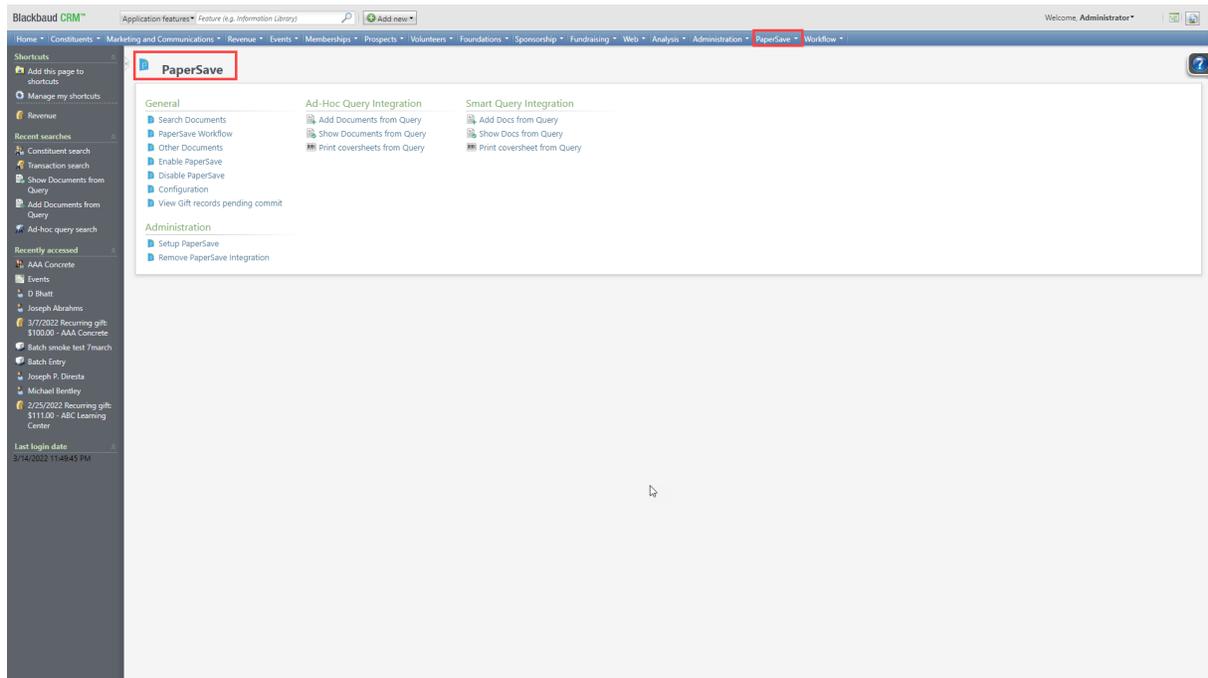
The Open Workflow option will open the Workflow Area of PaperSave in your default browser. The Workflow area is where you can perform various functions on the items in the available Workflows.

**Note:** The list of Workflows items will be displayed based on permissions and user roles for a current user as defined in the Configuration Area.

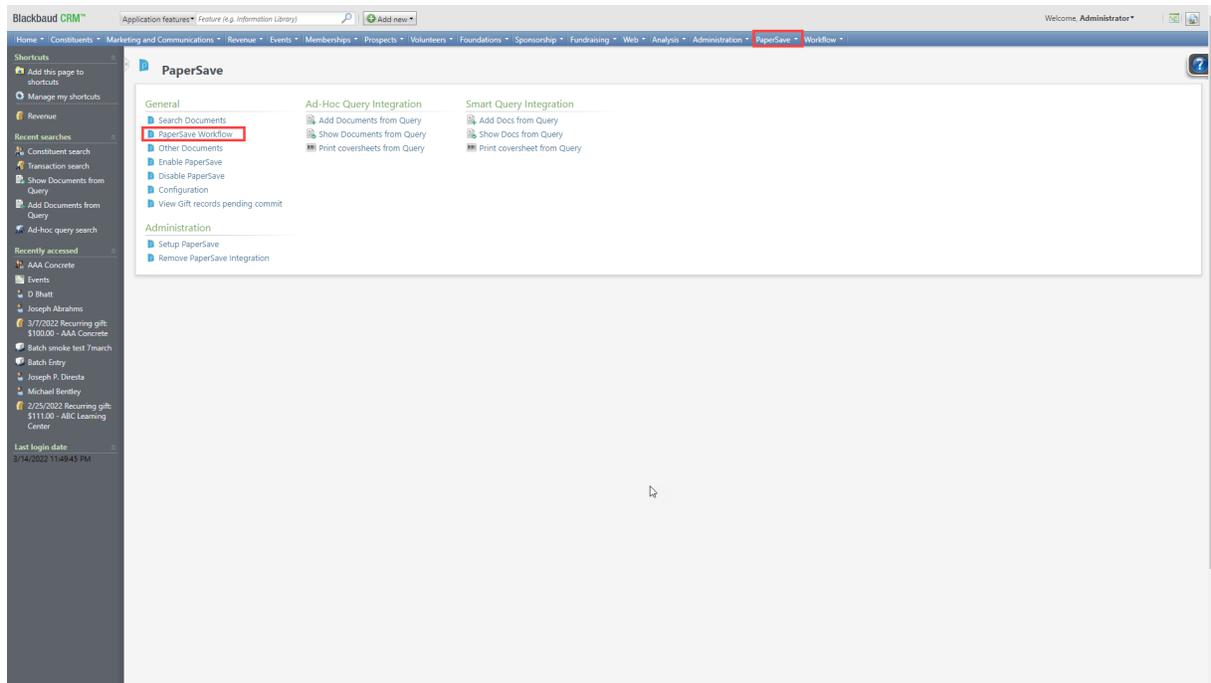
Follow the below steps to open PaperSave Workflow Area from the Blackbaud CRM application.



1) Go to Blackbaud CRM toolbar and select PaperSave drop-down arrow to view all the PaperSave options or directly click on **PaperSave** to open all options in a new tab as shown below.



2) Now, click on the **PaperSave Workflow** option present in the General group as shown in the below screen:



**Warning:** You must enable PaperSave to access PaperSave Workflow and other PaperSave options. Click [here](#) to view the steps to enable/disable PaperSave.

4) You get redirected to PaperSave Workflow Area. Click [here](#) to learn about the features and functionalities of the PaperSave Workflow Area.

Total Gifts **5**

[+ NEW](#)
[REFRESH](#)
[FILTER](#)
[GROUP BY AND SUBTOTAL](#)
[CHOOSE FIELDS](#)
[EXPORT TO EXCEL](#)

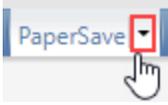
<input type="checkbox"/>	ID	Created	Step	Owner	Batch	FileName	File Size	Application	CRM Payment method	Customer No	Order Date	ConstituentID	Amount	Date	Revenue T
<input type="checkbox"/>	<a href="#">1099</a>	06-30-2021 04:56:22 AM	Data Entry	shahid@paperavenue.com		Download.jpg	0.01 MB	Donation				Carpet Factory Outlet	\$500.00		Recurring g
<input type="checkbox"/>	<a href="#">2009</a>	11-01-2021 02:53:07 AM	Data Entry	shahid@paperavenue.com	211K01222	img.jpg	0.27 MB	Donation				13MayComIJATII	\$100.00	06-18-2021	Recurring g
<input type="checkbox"/>	<a href="#">2130</a>	12-06-2021 01:24:09 AM	Data Entry	shahid@paperavenue.com		Purchase Order.pdf	0.50 MB	Donation				AAA Concrete	\$100.00	07-02-2021	Payment
<input type="checkbox"/>	<a href="#">2132</a>	12-06-2021 01:26:10 AM	Data Entry	shahid@paperavenue.com		Scan.pdf	0.49 MB	Donation				13MayComIJATII	\$10.00		Recurring g
<input type="checkbox"/>	<a href="#">2262</a>	12-16-2021 02:02:00 PM	Data Entry	shahid@paperavenue.com		Scan.pdf	0.01 MB	Donation				Carpet Factory Outlet	\$500.00	12-16-2021	Recurring g

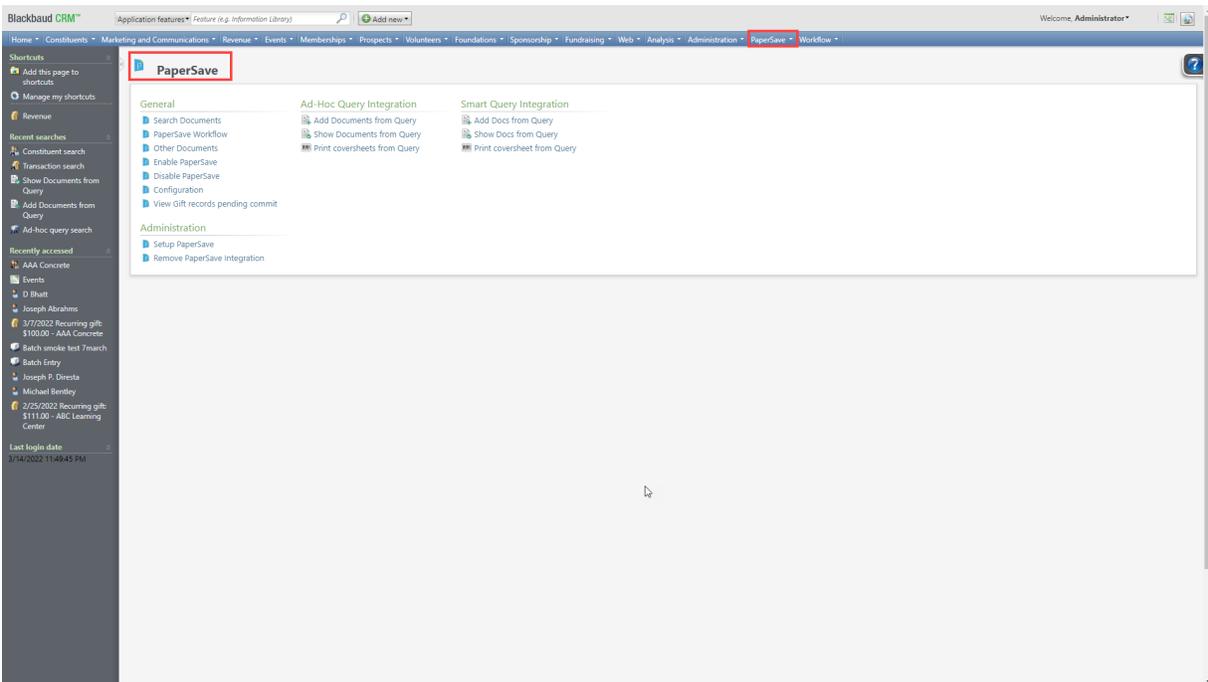
Quick walkthroughs

# Other Documents

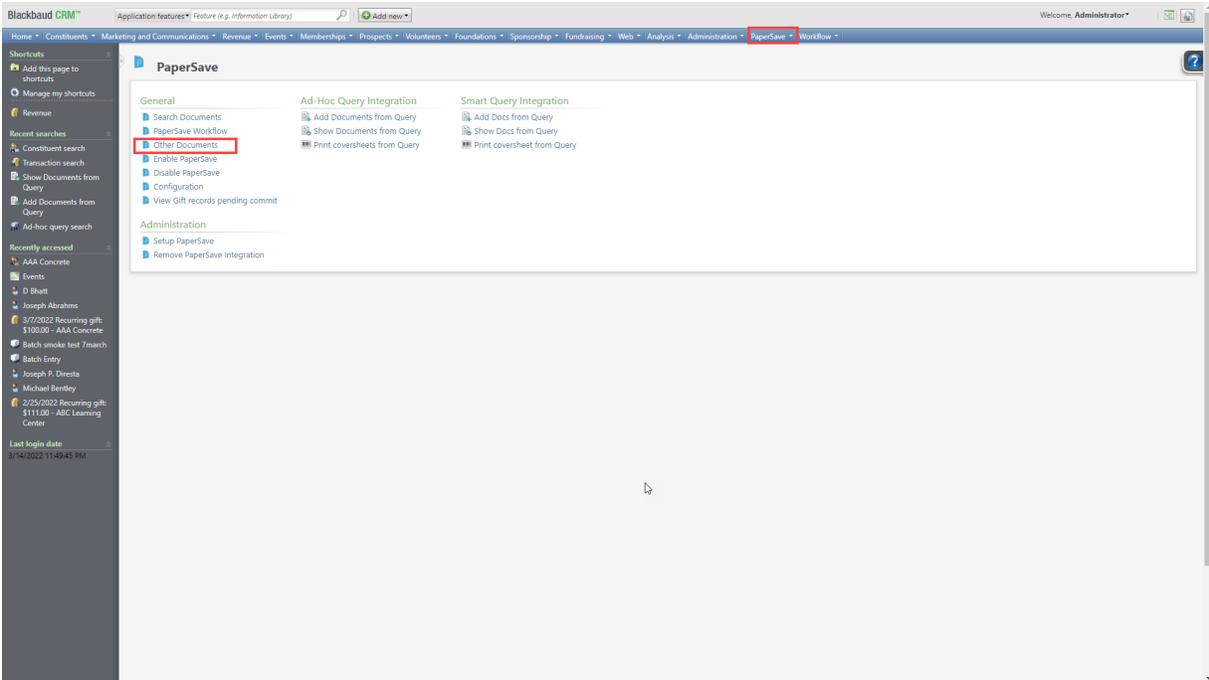
This option allows you to add or view the documents that are not related to Blackbaud CRM. Such documents are added within the PaperSave Standalone document type.

Follow the below steps to add/view PaperSave documents:

- 1) Go to Blackbaud CRM toolbar and select PaperSave drop-down arrow  to view all the Paper-Save options or directly click on **PaperSave** to open all options in a new tab as shown below.



- 2) Now, click on the **Other Documents** option present in the General group as shown in the below screen:



4) You can change the document type from the application bar (for example, General Documentation) and click on **+New** from the list toolbar to insert the document within the selected document type.

PaperSave		Document		General Documentation		Search within document list	
+ NEW		FILTER		REFRESH		CHOOSE FIELDS	
SHOW GROUPING		EXPORT TO EXCEL		INTERRELATED			
<input type="checkbox"/>	Created	Created By	test retention				
<input type="checkbox"/>	05/25/2021 10:39:24 AM	Phosphor@Dell.com					
<input type="checkbox"/>	05/25/2021 10:39:33 AM	Phosphor@Dell.com					
<input type="checkbox"/>	05/25/2021 10:39:37 AM	Phosphor@Dell.com					
<input type="checkbox"/>	05/25/2021 12:35:54 PM	Dennis Maloney	-1				
<input type="checkbox"/>	05/26/2021 04:15:14 AM	Dennis Maloney	8				
<input type="checkbox"/>	05/26/2021 04:17:15 AM	Dennis Maloney					
<input type="checkbox"/>	05/26/2021 04:17:32 AM	Dennis Maloney					
<input type="checkbox"/>	05/26/2021 04:17:36 AM	Dennis Maloney					
<input type="checkbox"/>	05/26/2021 04:20:07 AM	Dennis Maloney	8				

1 of 1 pages (9 items)

5) Select any of the desired method from the File capture options to acquire the document.

PaperSave   Add a New PaperSave Document   General Documentation



ScanNow™ using a Fujitsu fi-NX series scanner



Drag files here or [select files](#) to upload  
Maximum file size supported is 180 MB



ScanNow™ using any [recommended](#) TWAIN compliant scanner



[Click to](#) Generate a barcode to scan this document in a batch at a later time

6) Once you have acquired a document, you can add profile field details, validate it, and save it to the PaperSave Document type.

7) Now, the document will be displayed in the PaperSave document list from Non Host Related Documents and the Browse Area of PaperSave application. Click [here](#) to learn more about PaperSave documents in the Browse Area.

**Note:** The documents added within the PaperSave document type cannot be submitted to the Blackbaud CRM.

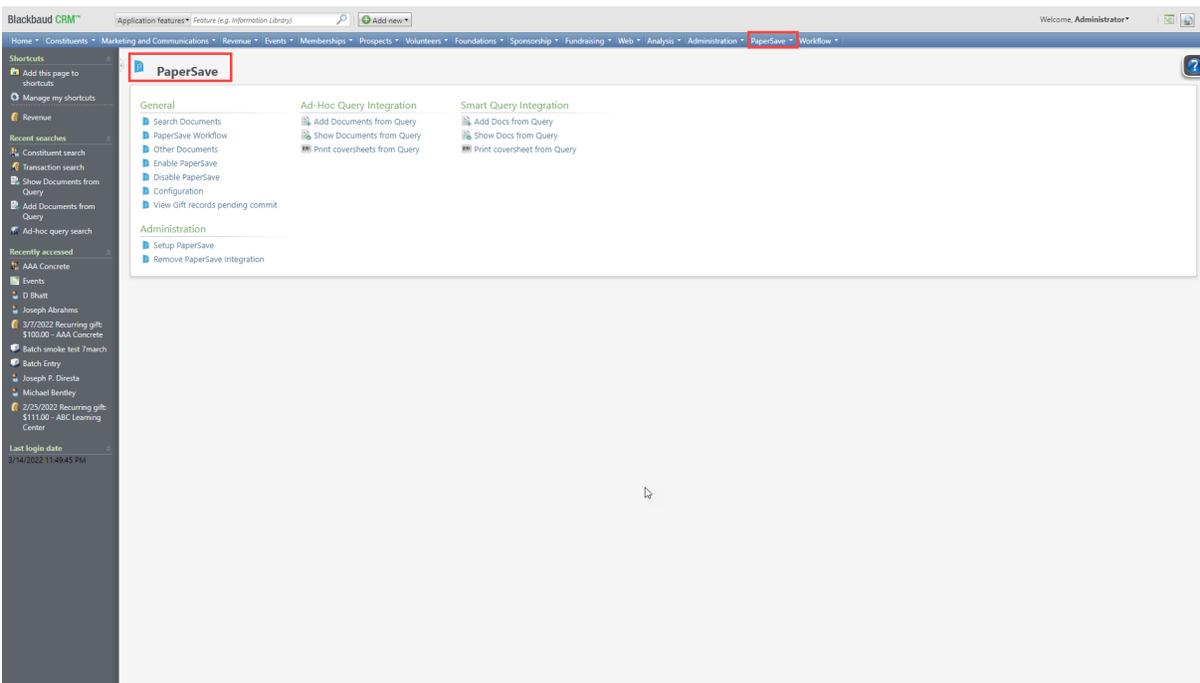
# Enable/Disable PaperSave

You can control the PaperSave options accessibility within PaperSave supported record types of Blackbaud CRM using Enable/Disable option from PaperSave customized menu.

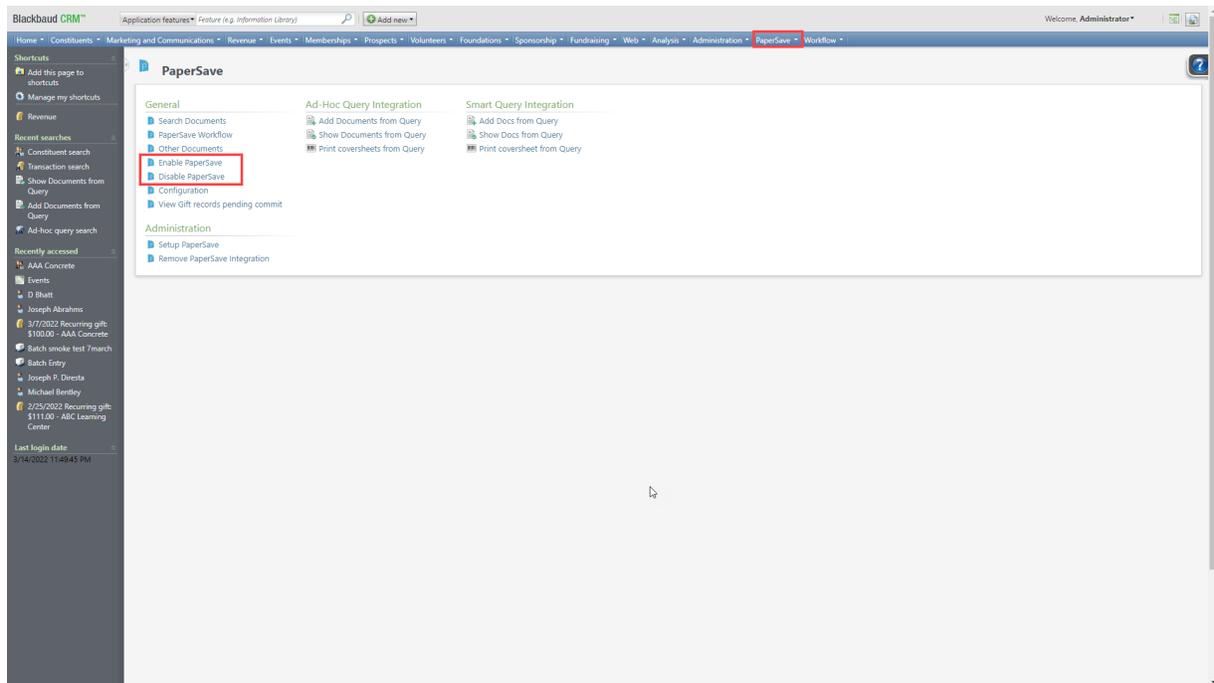
**Warning:** You can enable PaperSave only when the current PaperSave logged in user has rights to **add/view documents related to the instance**. This rights can be managed from Integrated App Instances tile in the Configuration Area by the user who has "Configuration Admin" role.

Follow the below steps to enable/disable the PaperSave options.

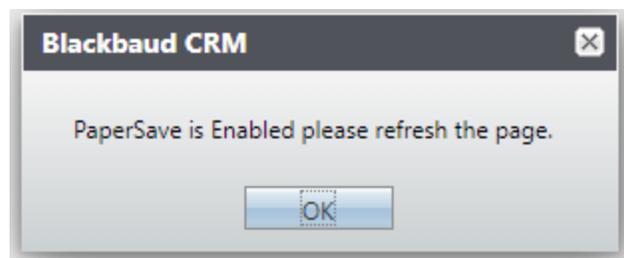
1) First, go to Blackbaud CRM toolbar and select PaperSave drop-down arrow  to view all the PaperSave options or directly click on **PaperSave** to open all options in a new tab as shown below.

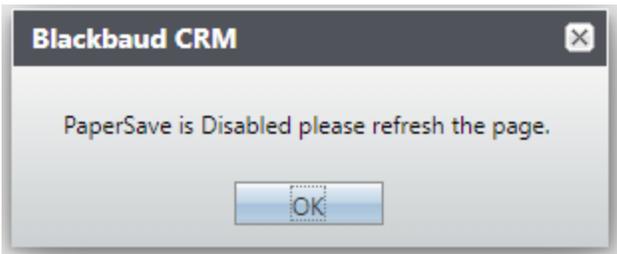


2) Now, click on the **Enable PaperSave** option to start using PaperSave options and **Disable PaperSave** option to stop the working of PaperSave options across all the PaperSave supported record types as shown in the below screen:



4) When you click on **Enable PaperSave** the below prompt appears and when clicked on **Disable PaperSave** the following Entry prompt gets displayed.

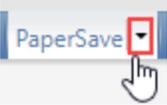


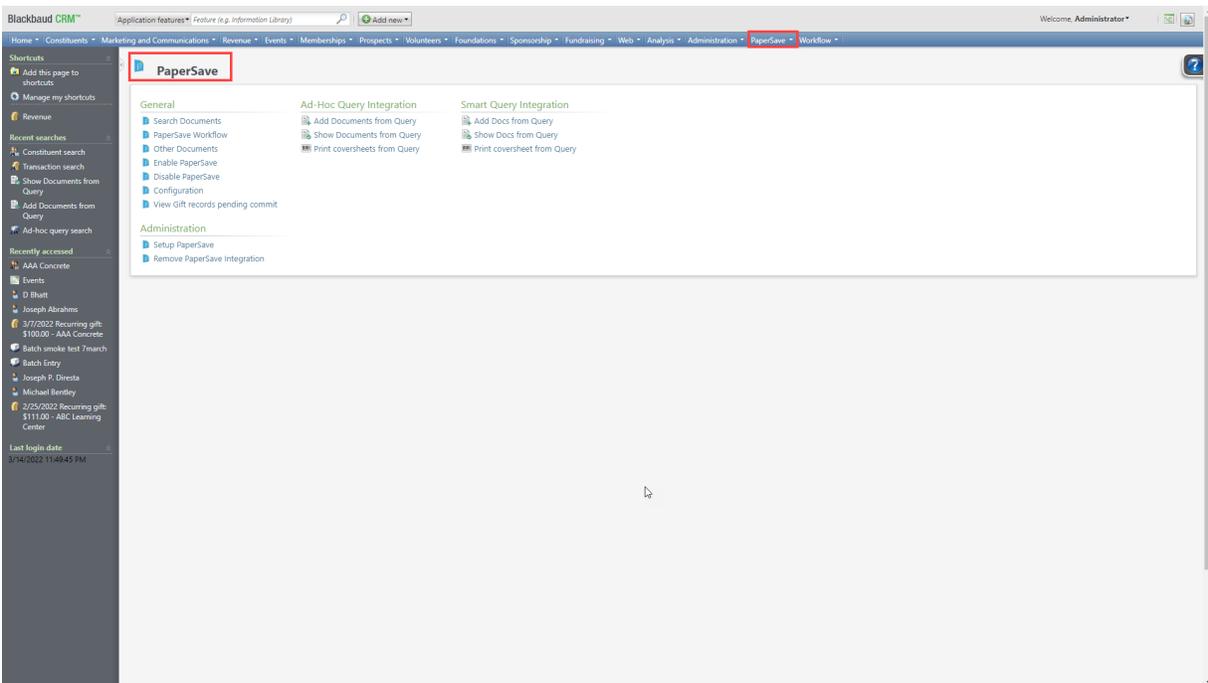


# Configuration

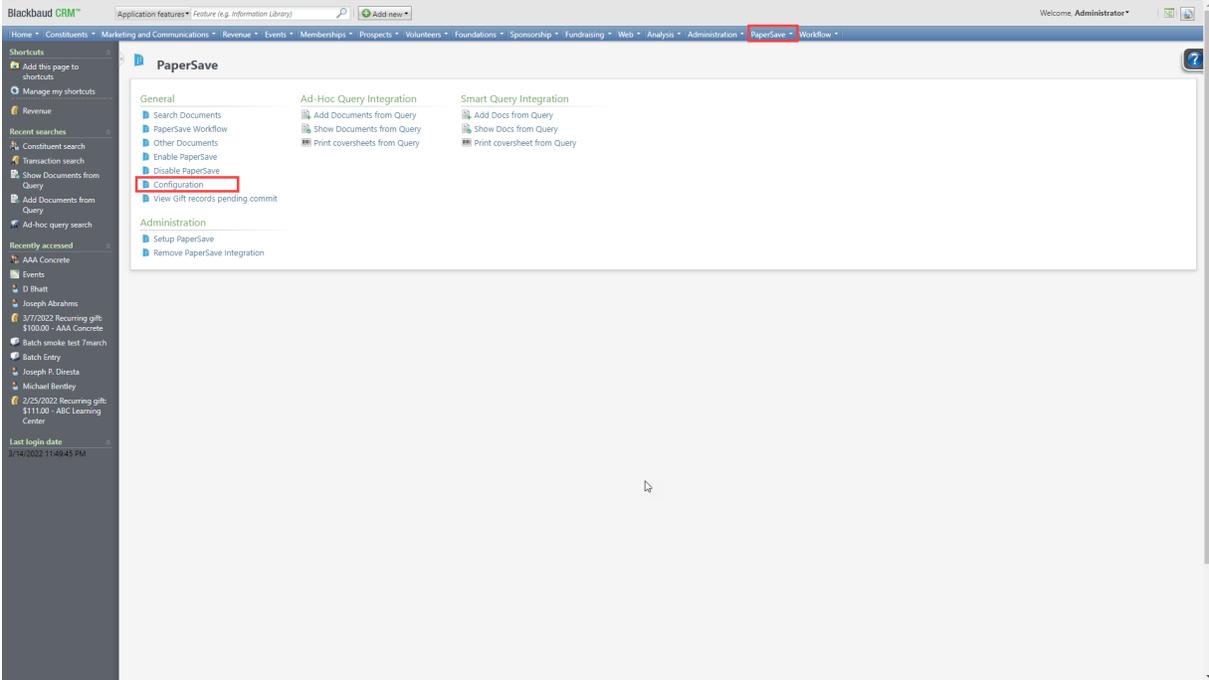
Configuration option allows you to define the user who will be responsible for association of documents when revenue or membership batch gets committed.

Follow the below steps to define such responsible user from Configuration option:

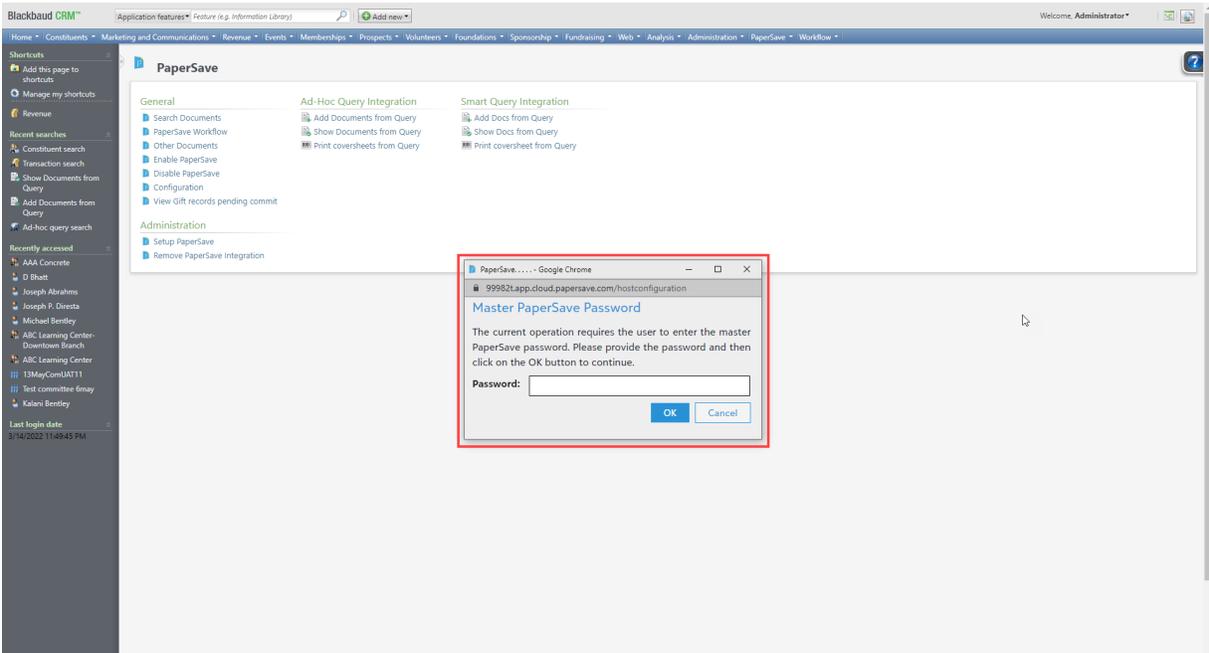
1) First, go to Blackbaud CRM toolbar and select PaperSave drop-down arrow  to view all the PaperSave options or directly click on **PaperSave** to open all options in a new tab as shown below.



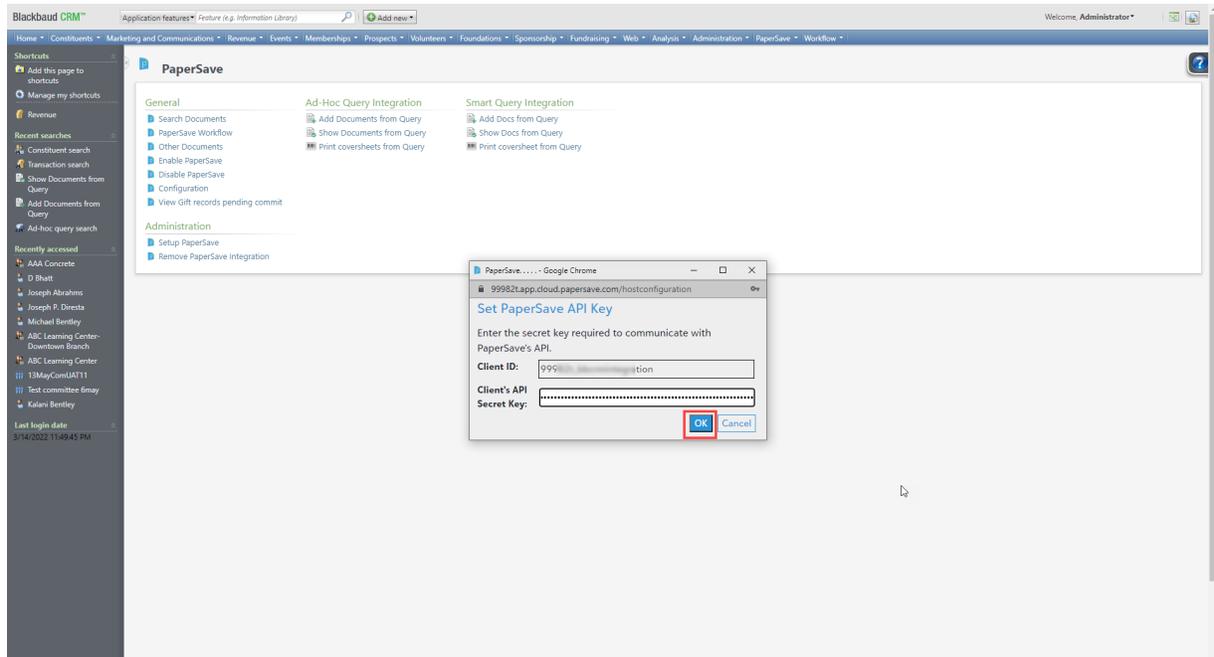
2) Now, click on the **Configuration** option present in the General group as shown in the below screen:



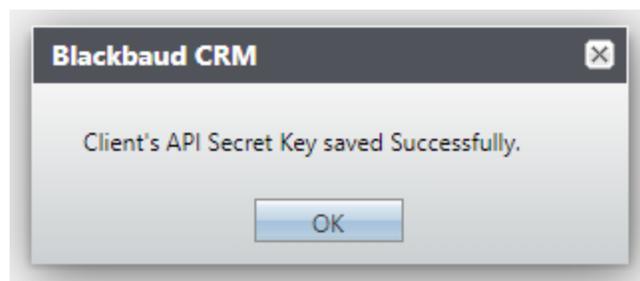
3) Now, it prompts for PaperSave's Master Password. Enter the Password and Click on **OK**.



4) Thereafter, it prompts you to enter the Client ID and Secret key in the respective fields for the Communication with PaperSave's API. Once you have entered the details, click on **OK** button.



5) If the correct details are entered then the success message gets prompted as shown below.



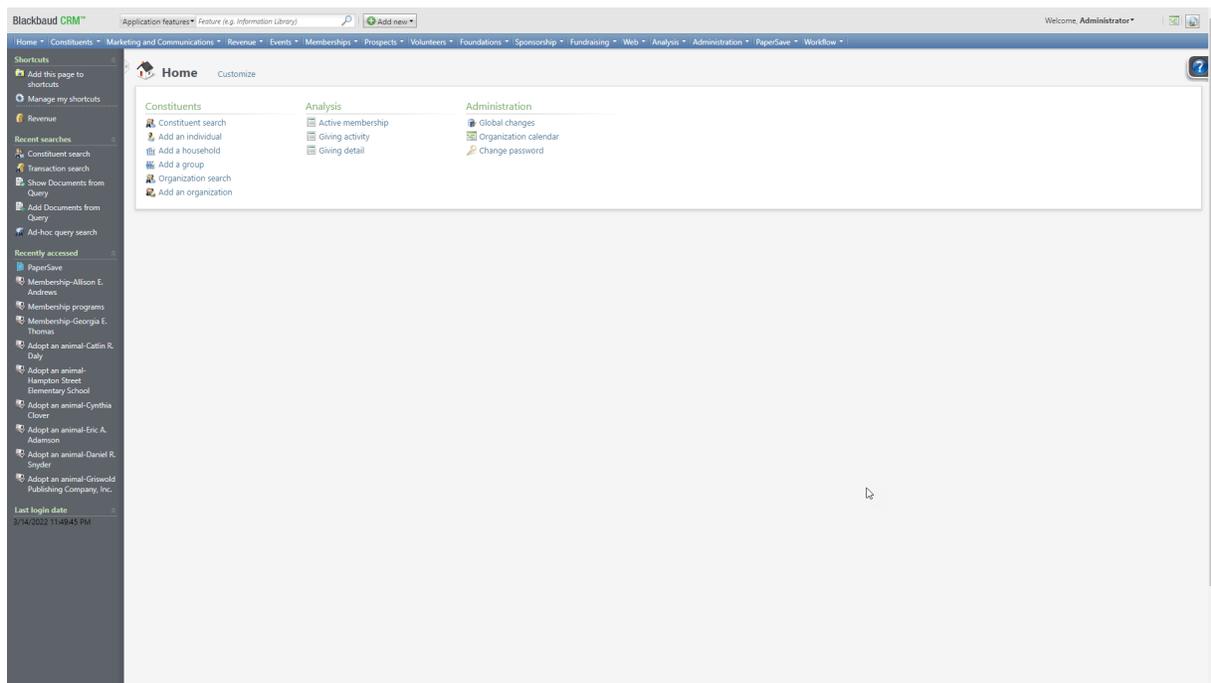
# View Gift records pending commit

**View gift records pending commit** feature allows you to associate such PaperSave documents with Revenue Payment records in Blackbaud CRM, which were not associated when the batch was committed.

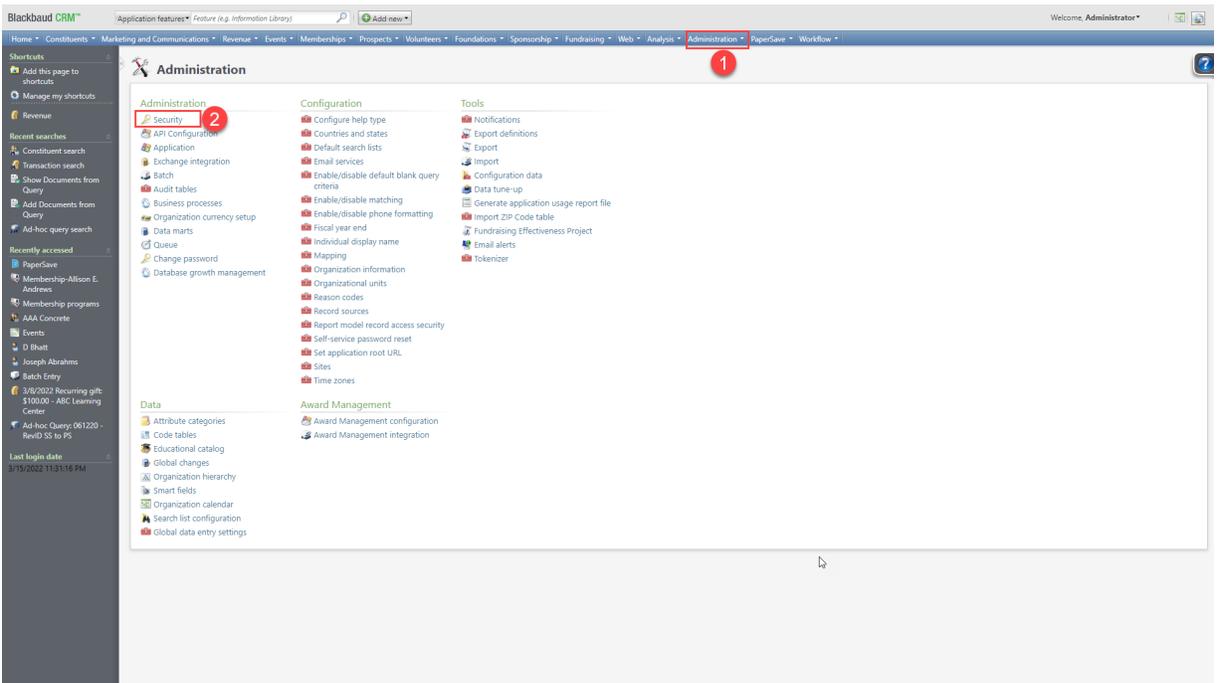
## How to enable "View gift records pending commit" option in PaperSave Menu within Blackbaud CRM ?

The following steps should be performed by the user who can manage Blackbaud CRM **System Roles** to enable the **View gift records pending commit** option.

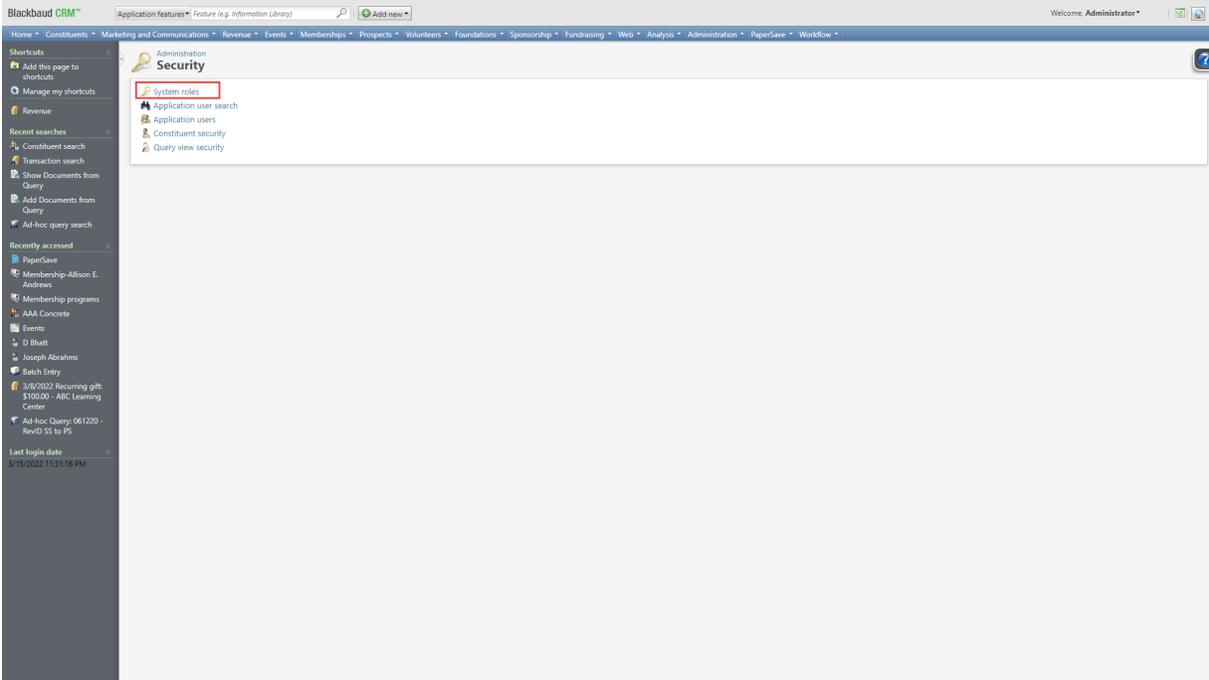
1) Log-in to Blackbaud CRM.



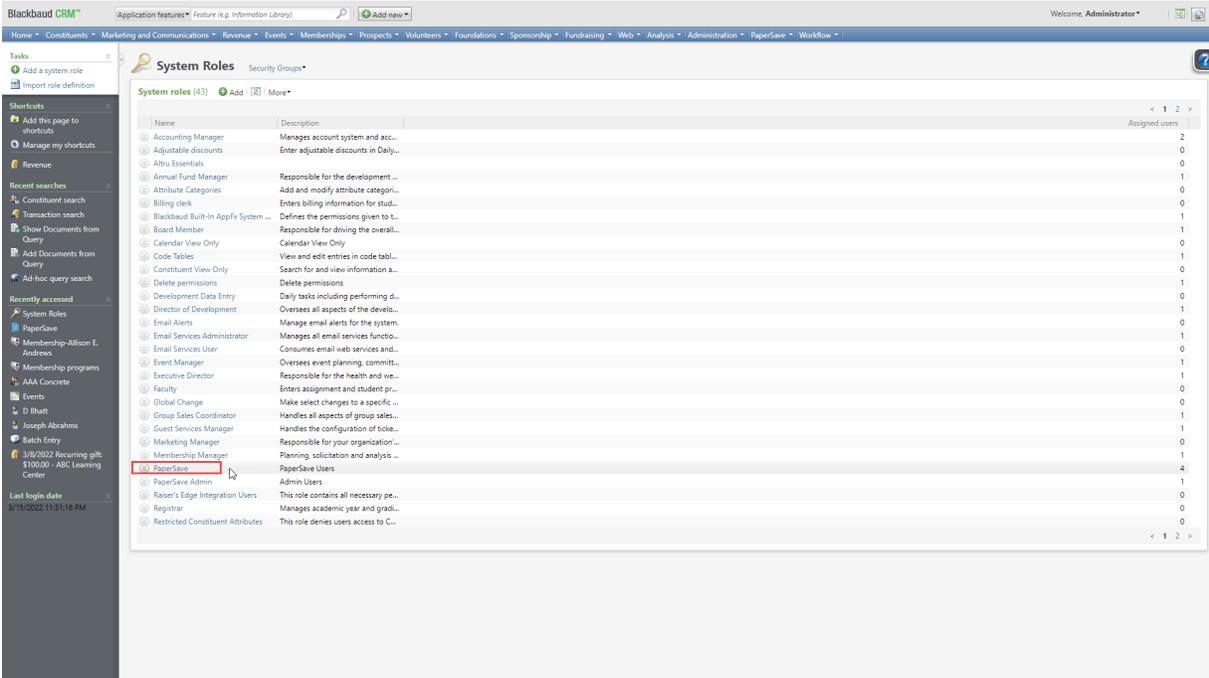
2) Click on **Administration** menu. Then, click on **Security**.



3) Click on **System roles** in the Security section.



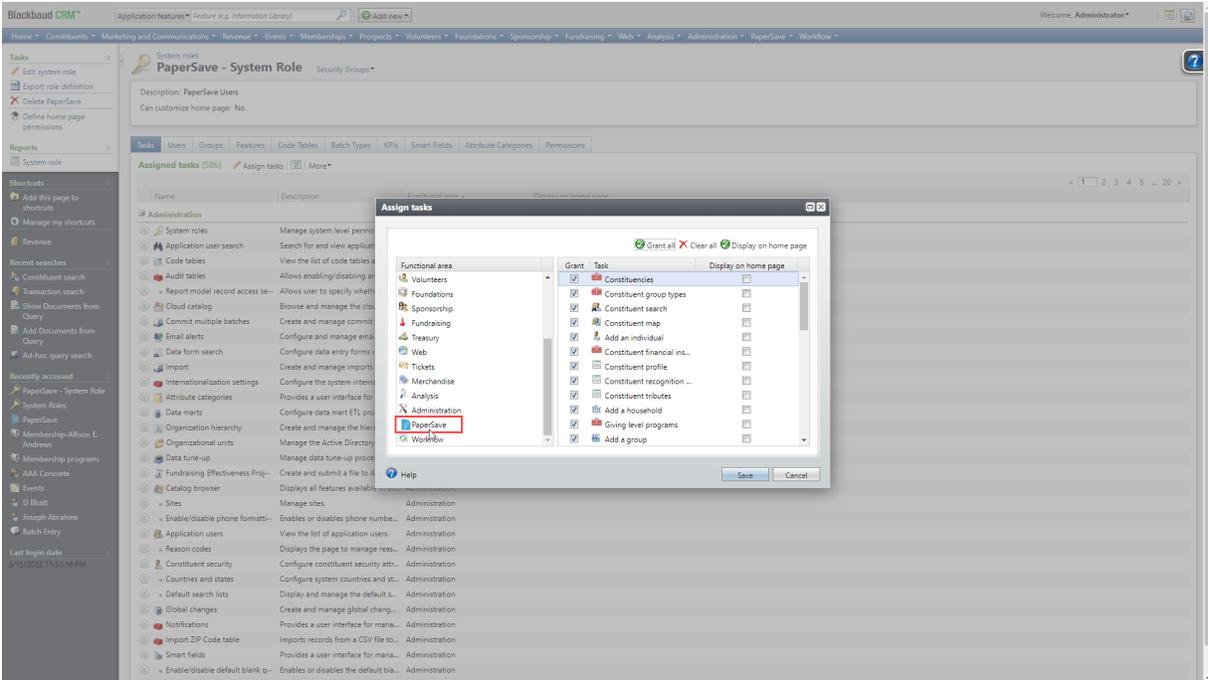
4) Click on **PaperSave** in the "System Roles".



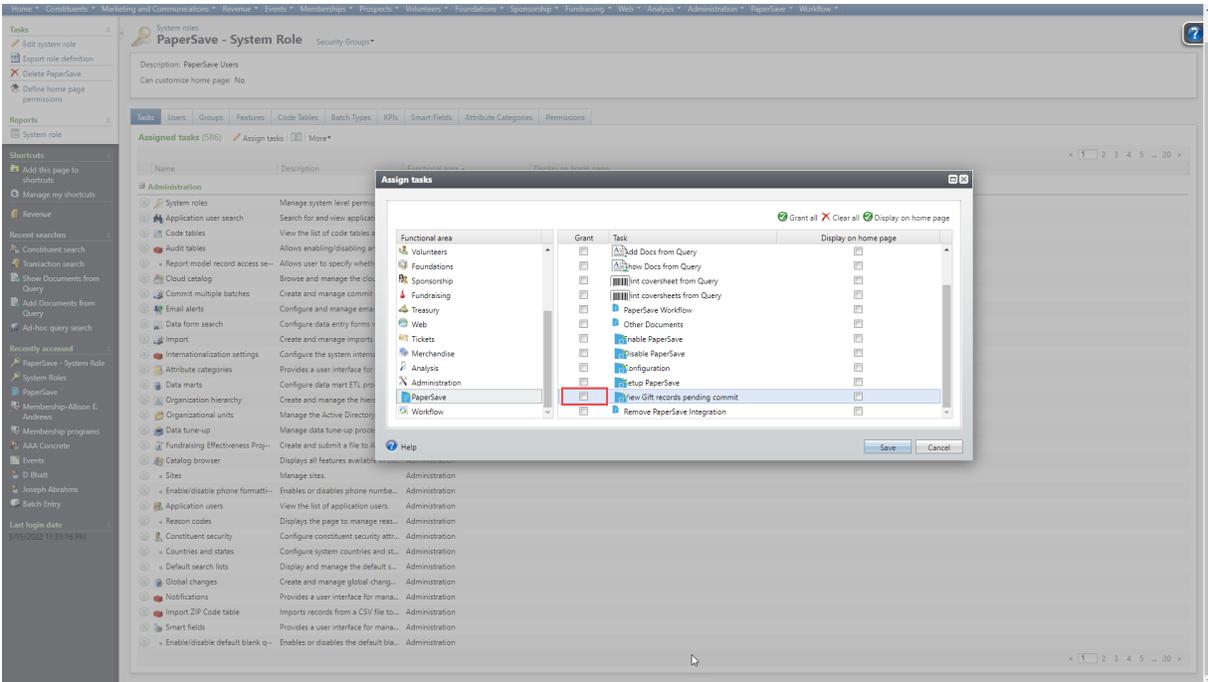
5) Now, click on **Assign Tasks** in PaperSave System Role.

The screenshot shows the Blackbaud CRM interface. The main content area is titled "PaperSave - System Role" and includes a description "PaperSave Users" and a note "Can customize home page: No". Below this, there are tabs for "Tasks", "Users", "Groups", "Features", "Code Tables", "Batch Types", "XPLs", "Smart Fields", "Attribute Categories", and "Permissions". The "Tasks" tab is active, showing a list of "Assigned tasks (506)". A red box highlights the "Assign tasks" button. The list of tasks includes various administrative functions such as "System roles", "Application user search", "Code tables", "Audit tables", "Report model record access se...", "Cloud catalog", "Commit multiple batches", "Email alerts", "Data form search", "Import", "Internationalization settings", "Attribute categories", "Data marts", "Organization hierarchy", "Organizational units", "Data tune-up", "Fundraising Effectiveness Proj...", "Catalog browser", "Sites", "Enable/disable phone formatt...", "Application users", "Reason codes", "Constituent security", "Countries and states", "Default search lists", "Global changes", "Notifications", "Import ZIP Code table", "Smart fields", and "Enable/disable default blank q...".

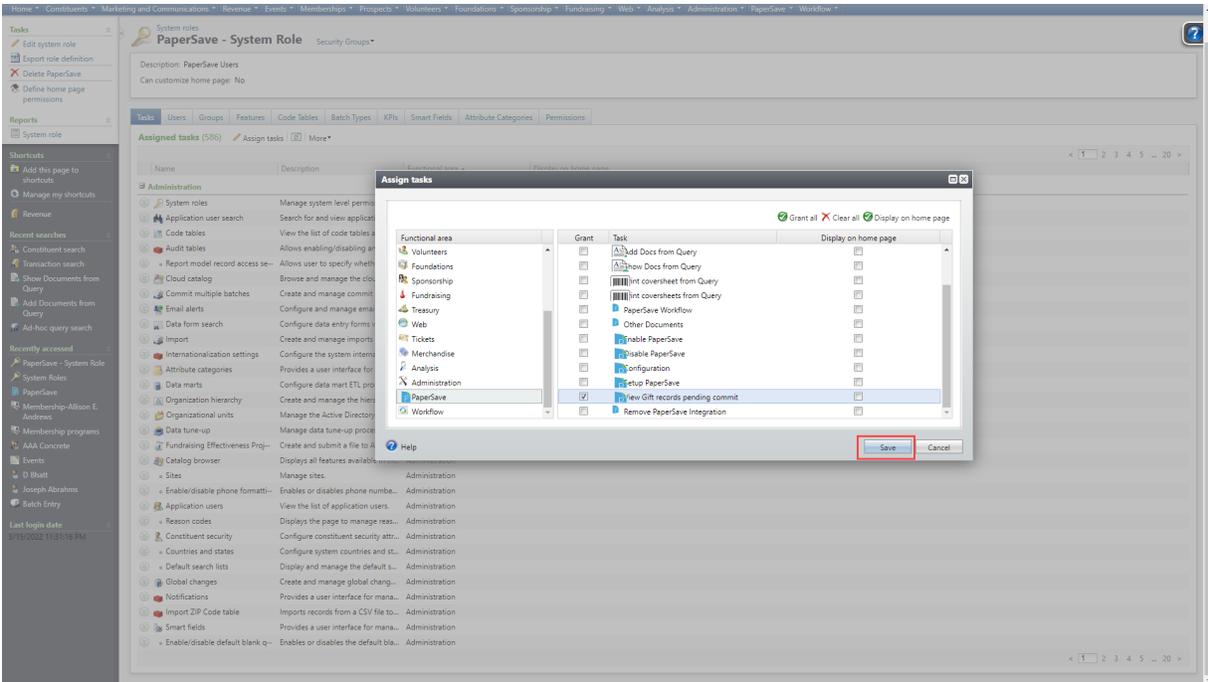
6) Select **PaperSave** from the functional area section.



7) Now, you will see a list of PaperSave tasks. Then, tick mark **View gift records pending commit** task from the list.



8) Click on the **Save** option. Now, the **View gift records pending commit** option is available under the General group in PaperSave Menu tab.



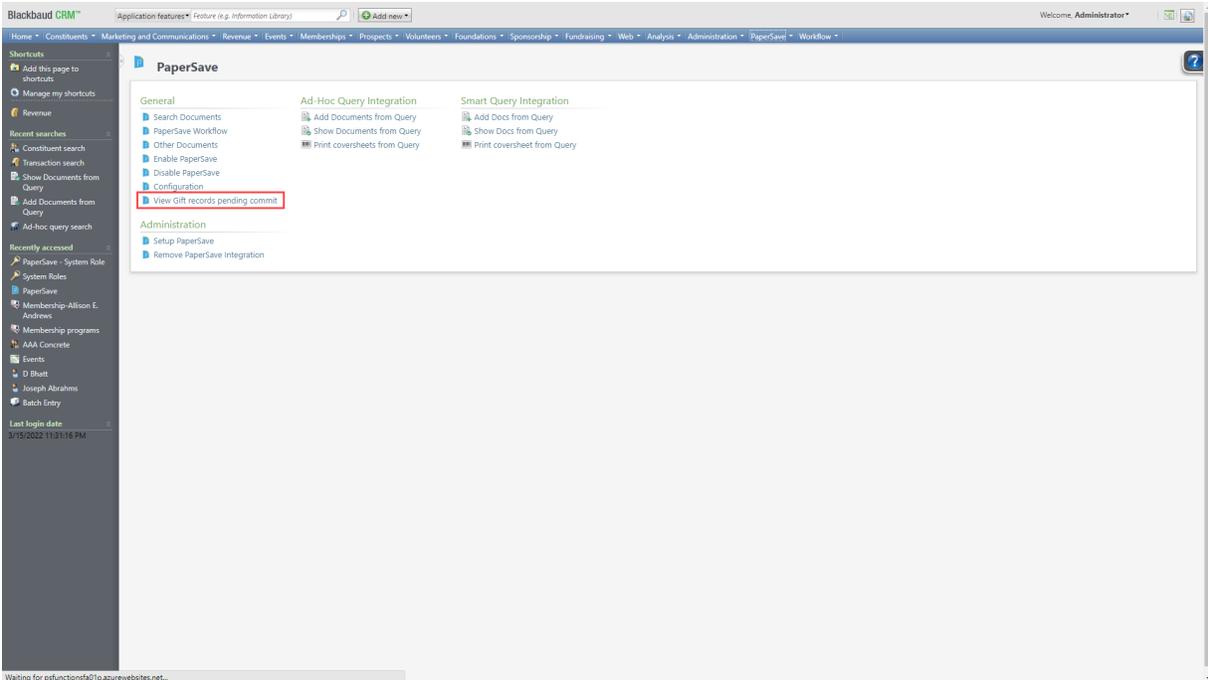
## Note:

1) The steps mentioned above, to enable the **View gift records pending commit** option in PaperSave menu tab, are required to be performed one time only by the user who can manage Blackbaud CRM **System Roles**.

2) Also, it is required to re-launch Blackbaud CRM in the browser upon completion of the above steps to see the **View gift records pending commit** option.

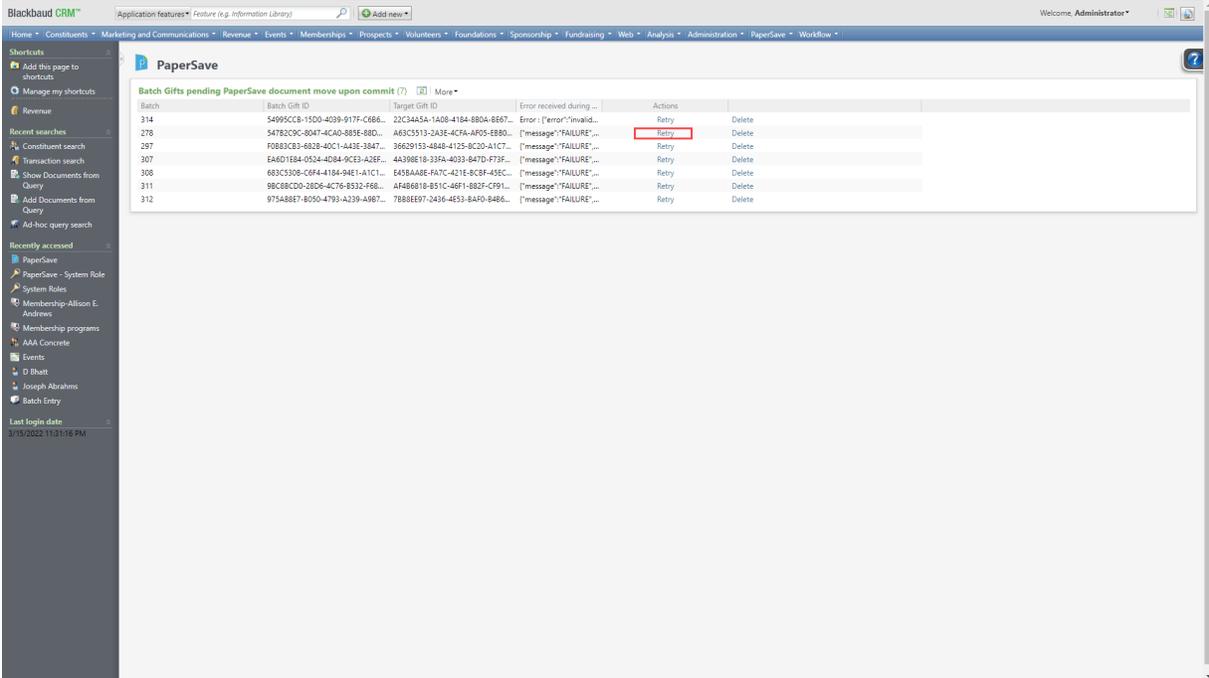
## How to use "View gift records pending commit" feature in Blackbaud CRM ?

1) Navigate to the **PaperSave** Menu Tab. You will see the **View gift records pending commit** option under the General group.

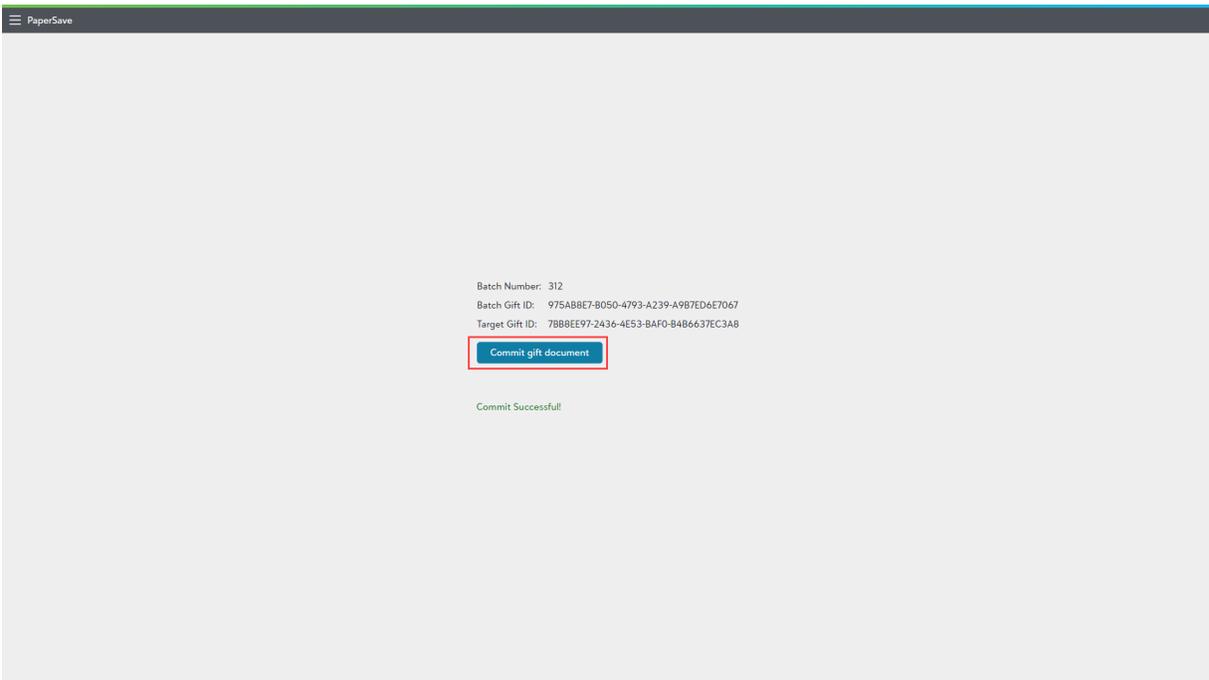


2) Click on **View gift records pending commit** option.

3) You will see the links with the list of batches that were committed successfully in Blackbaud CRM but Paper-Save document(s) were not associated with the created revenue payment record. To resolve the document association, click on the **Retry** option for the desired batch.



4) Now, It will open the below screen. Then, click on **Commit gift document** button.



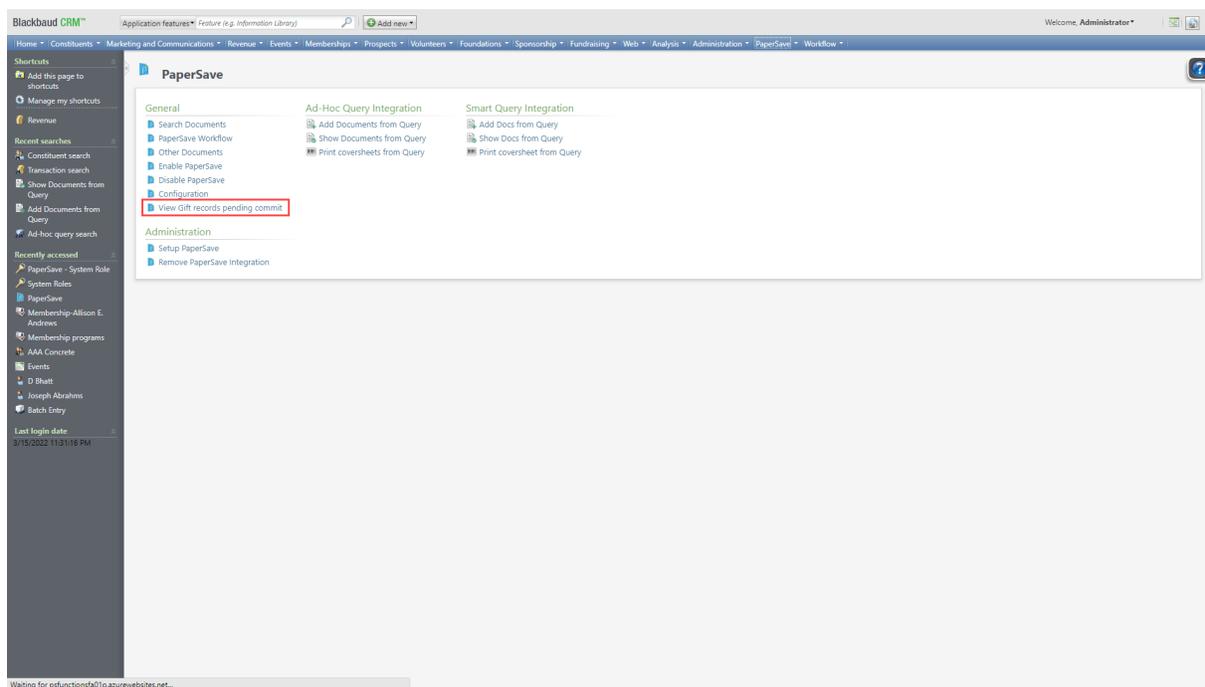
5) Once batch **Commit gift document** operation is performed successfully, it shows a message “Commit Successful!”.

6) Now, you can open Revenue payment record for batch to see the PaperSave documents associated with the batch record.

## Delete a batch from the list

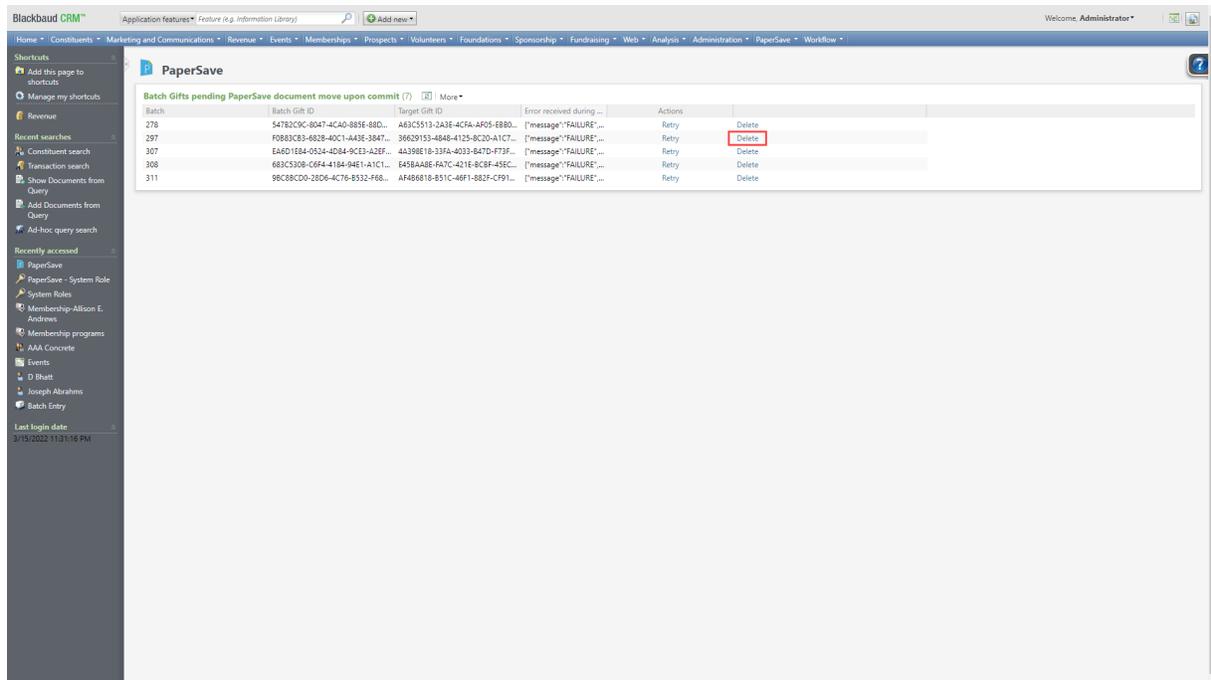
Follow the below steps to discard such batch that was committed successfully, but PaperSave document(s) were not associated.

1) Navigate to the **PaperSave** Menu Tab. You will see the **View gift records pending commit** option under the General group.

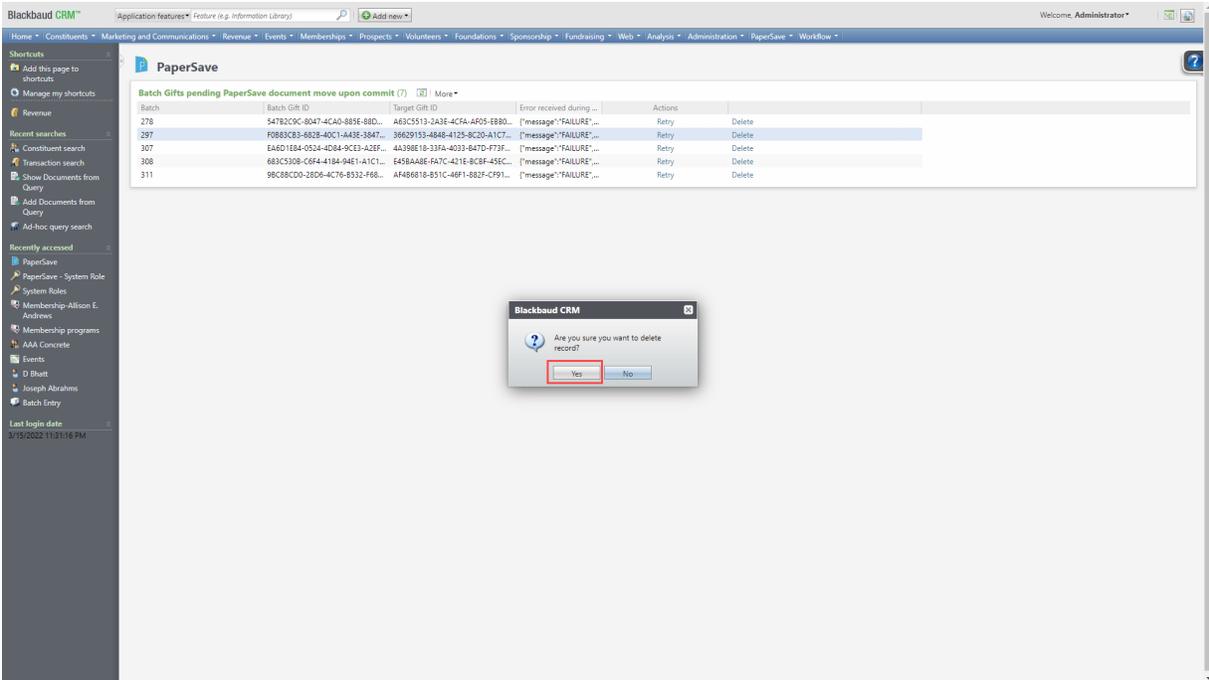


2) Click on **View gift records pending commit** option.

3) Now, you will see the links with the list of batches that were committed successfully in Blackbaud CRM but PaperSave document(s) were not associated with the created revenue payment record. To remove the desired batch from the list of batches, click on the **Delete** option as shown in below screen.



4) It will display a confirmation prompt. Click on **Yes** button to confirm the deletion of the batch, or click on **No** to cancel the delete operation.

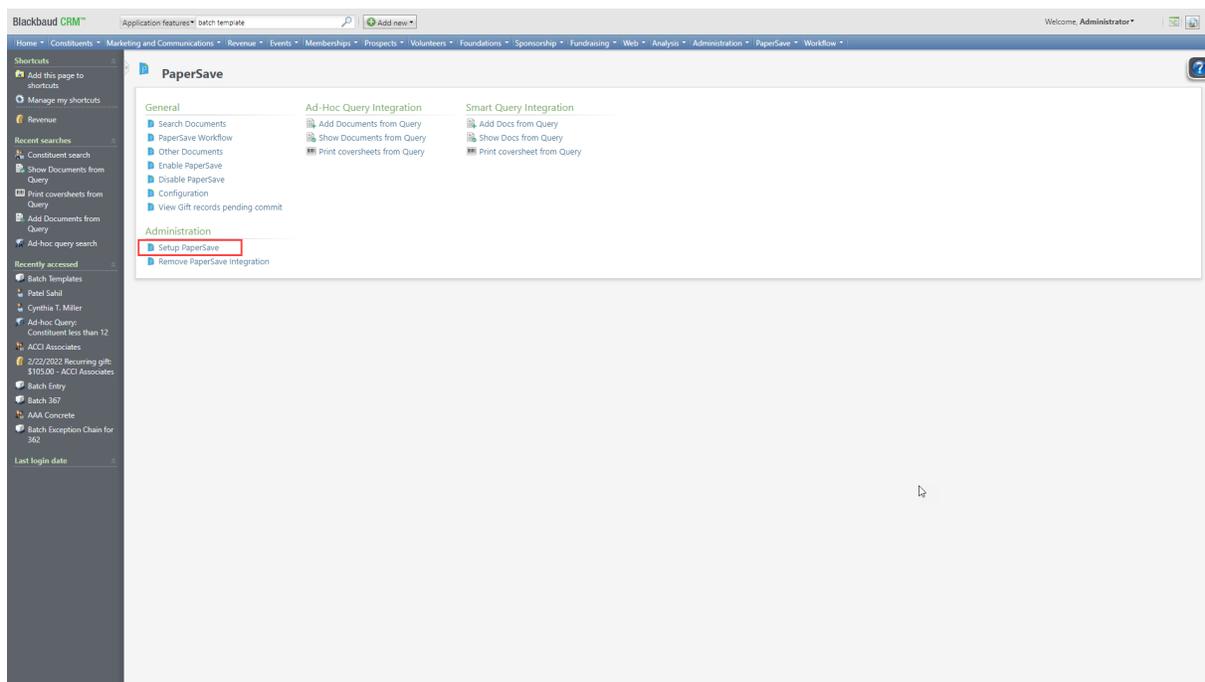


**Note:** Please re-launch Blackbaud CRM in the browser, if you are aware that **View gift records pending commit** option is enabled in the PaperSave menu tab within Blackbaud CRM, and still you are not able to view this option.

# Setup PaperSave

Follow the below steps to configure PaperSave in Blackbaud CRM:

- 1) Go to "PaperSave" Tab and select **Setup PaperSave** from Administration group.



- 2) You will see a dialog prompt for PaperSave Configuration as shown in the below screen.

The image shows a 'PaperSave Configuration' dialog box with the following fields:

- Root URL:
- Company Name:
- WebModule URL:
- Client ID:
- Client Secret:

Buttons: Save, Cancel

3) Enter the following details in PaperSave Configuration and click on **Save** button.

- **Root URL:** Enter PaperSave Application Server URL. You can find this from PaperSave Start.aspx page.

**Example:** https://ServerName:PortNumber

- **Company Name:** Enter details in the given format SQLSERVERNAME\INSTANCE.BBCRMDatabase

**Example:** HPSDEV45\BBCRM.BBInfinity

If Blackbaud CRM server is not installed on the instance, then use the below format SQLSERVERNAME.BBCRMDatabase

**Example:** HPSDEV45.BBInfinity

- **Web Module URL:** Enter the PaperSave Web Module URL.

**Example:** <https://{{tenantid}}.app.cloud.papersave.com>

- **Client ID:** Enter the PaperSave Client ID. You can get these details from PaperSave team.
- **Client Secret:** Enter the PaperSave Client secret key. You can get these details from PaperSave team.

**PaperSave Configuration** [X]

Root URL: [ ]

Company Name: HVTE [ ] 82t

WebModule URL: https://.cloud.papersave.com

Client ID: [ ]

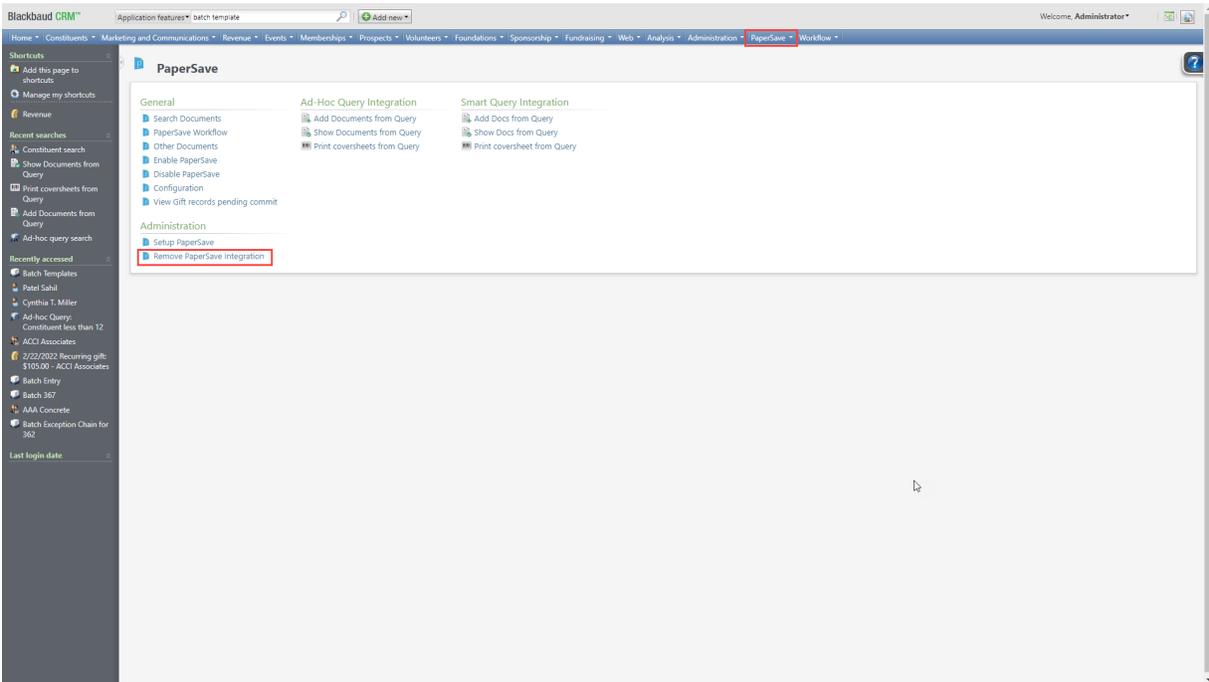
Client Secret: [ ]

[ Save ] [ Cancel ]

# Remove PaperSave Integration

Follow the below steps to remove PaperSave integration from Blackbaud CRM,

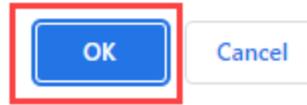
1) Go to "PaperSave" Tab and select **Remove PaperSave Integration** from Administration group as mentioned in below screen.



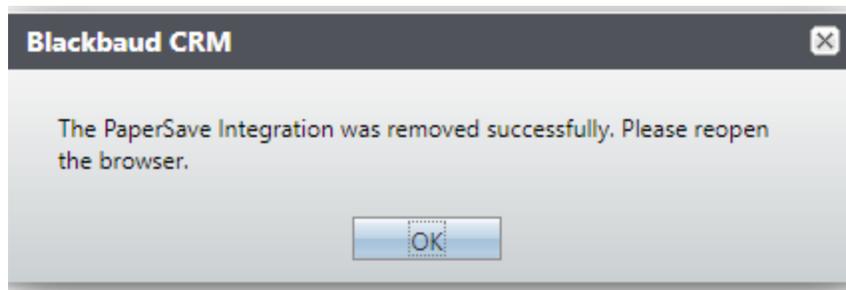
2) Now, it prompts confirmation dialog box. Click on **OK** to remove the PaperSave integration as shown in the below screen.

hvt [redacted] 48 says

Are you sure that you want to remove the PaperSave integration from this CRM instance?



3) Once PaperSave configuration is removed successfully, it displays the below message.

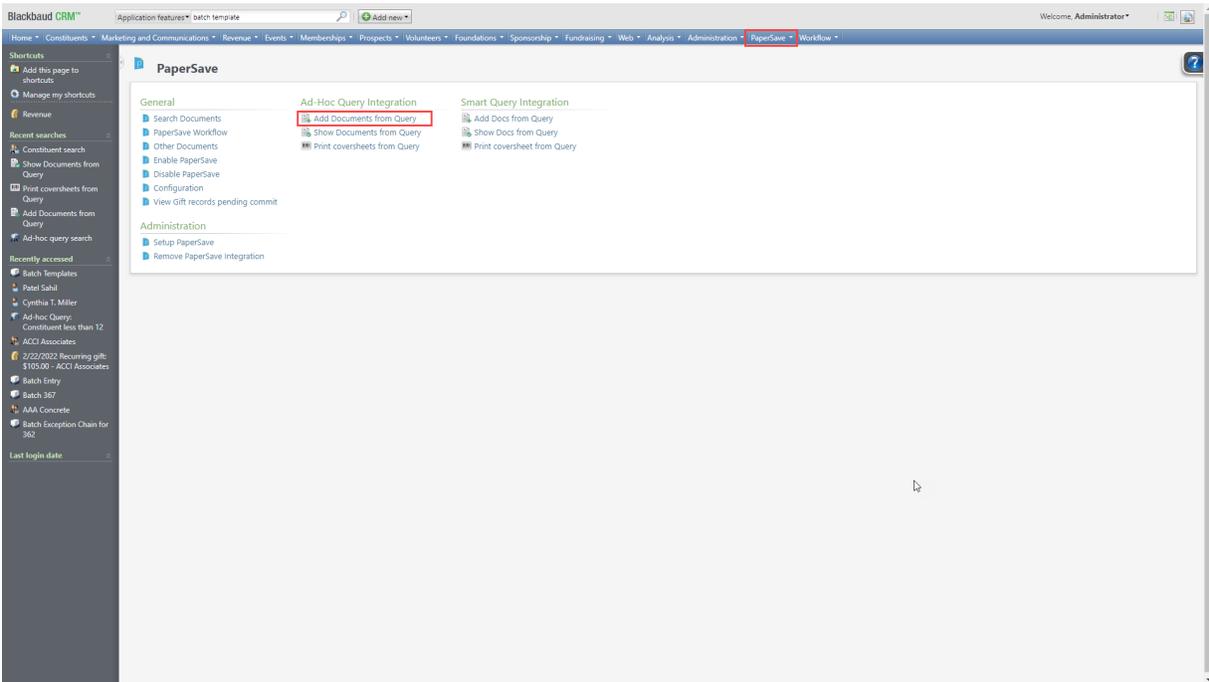


4) Now, relaunch Blackbaud CRM application in the browser.

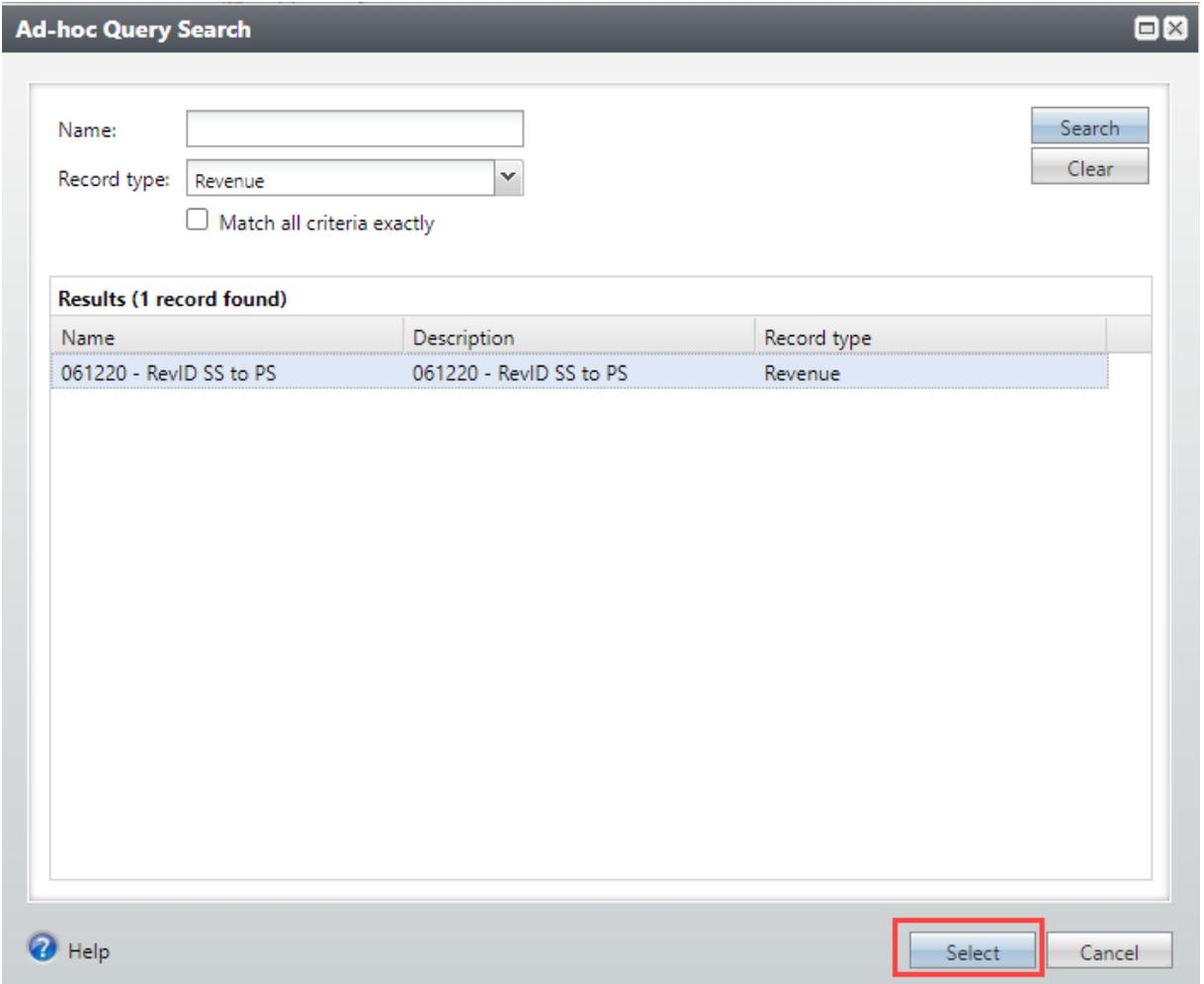
# Add documents from query

To add documents from query for Ad-Hoc query integration, follow the below given steps:

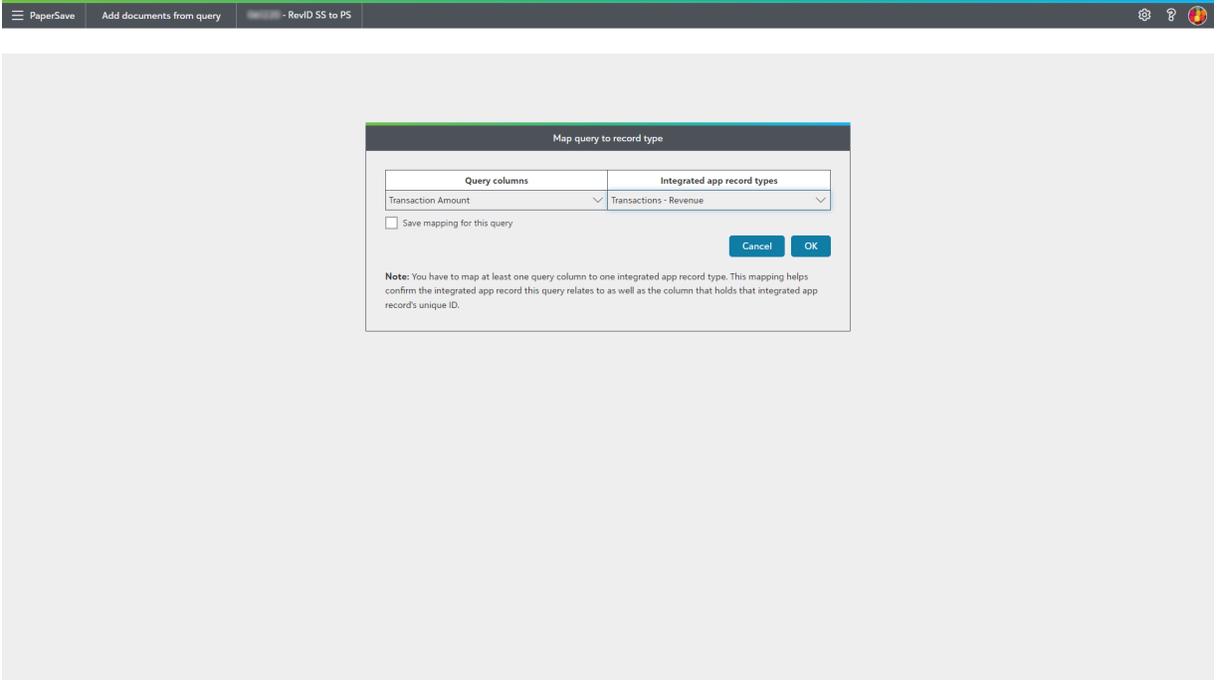
1) Go to "PaperSave" Tab and select **Add Documents from Query** from Ad-Hoc Query Integration group as shown in the below screen.



2) An Ad-hoc Query Search dialog box appears. Select Record Type (for example, Revenue) from the drop-down and click on search. Now, Ad-hoc query result appears. Select the desire query (if there are multiple results) and click on **Select** button in dialog box as shown below.

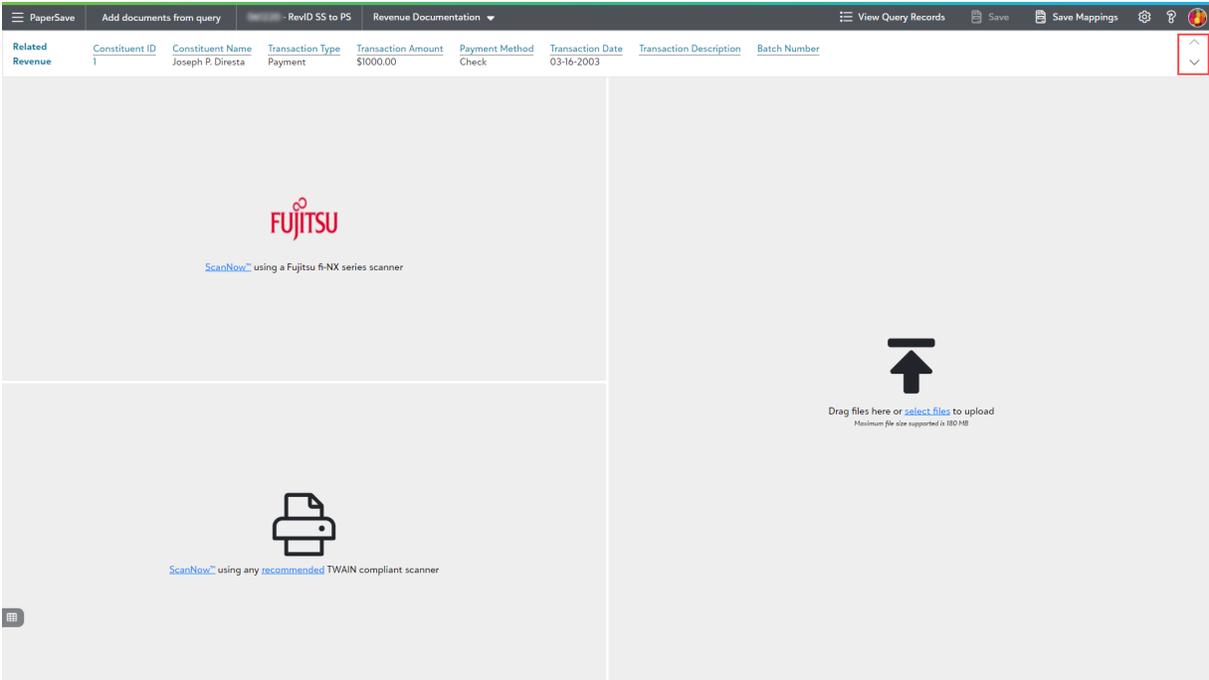


3) You get redirected to PaperSave's "Add documents from query" window in the browser as shown in the below screen. Here, you need to map 'Query columns' with the PaperSave supported Blackbaud CRM Record types in the drop down list and click on **OK** to map the query. You can check the box to **Save mapping for this query** directly from the dialog box.



**Note:** If you save the current mapping, then you will be automatically redirected to the File capture options page next time when you add documents from query for the same Record type.

4) Once you click on **OK**, you are redirected to the File capture options panel as shown in the below screen. You can also use the navigation arrows to move to the next record in the query to add a document.



5) From this add document page, you can navigate to different PaperSave Areas, change the document type, view a list of the query records, save/clear mappings, and acquire the document by using different file capture options.

**Note:** If the mappings are saved, then the **Save Mappings** option will be changed to **Clear Mappings**. You can click on **Clear Mappings** to create the new mappings.

6) Once you have acquired the document, you get redirected to the item viewer where you can enter the required values in the profile fields and apply annotations as needed before clicking on **Save** option from the top-level toolbar to add the document to the selected record.

PaperSave Add documents from query 061220 - RevID SS to PS Revenue Documentation View Query Records Save Save Mappings

Related Revenue Constituent ID 1 Constituent Name Joseph P. Diresta Transaction Type Payment Transaction Amount \$1000.00 Payment Method Check Transaction Date 03-16-2003 Transaction Description Batch Number Refresh

Franke Foodservice Supply, Inc  
 800 AVIATION PKWY  
 SMYRNA, TN 37167-2581  
 Acct Rec (P):1-888-800-0623 (P):615-462-5460  
 Acct Rec (F):1-877-700-0623  
 Cust Svc (P):1-800-877-5178 (P):615-462-4000  
 Cust Svc (F):1-877-538-6882

**Invoice Address**  
 GPS Hospitality, LLC,  
 2100 RIVEREDGE PKWY  
 ATLANTA, GA 30328-4693  
 USA

**Delivery Address**  
 Burger King 7166  
 1197 BERKSHIRE BLVD  
 WYOMISSING, PA 19610-1245  
 USA

Update delivery address

**Invoice**  
 Invoice no: 84949873  
 Invoice date: 19-Feb-2016  
 Order no: 37496168  
 PO #: Autoshipment-6602  
 Order from: Scheidegger, Mike  
 Shipping date: 02/19/16  
 Cust Service Rep: Mykes Coajoumjian  
 Store no: 5022333  
 Customer no: 11062-018811  
 Customer store no: 7166

**Reference:** Net 30  
**Payment terms:** FOB Shipping Point  
**Ship via:** UPS Ground  
**GST #:** 869575928RT0001  
**Tracking #:** 1Z19E0W30334789953

ID: 24739  
 Batch: Franke Foodservice Supply, Inc -1.pdf

**Document Profile**  
 Order Date: 03-24-2022  
 Customer No: 11062-018811

Attn: Restaurant Manger  
 Comment:

Page # 1 / 2

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UCM	Unit price USD	Totals USD
<b>Parts</b>							
10	492434	First Aid Burn Cream (10 pack)	1	1	EA	2.09	2.09
20	618562	Ointment, First Aid Antibiotic (10 ) Packs	1	1	EA	2.09	2.09
30	492433	Gel, Burn Relief 3.5gm (6 per pack)	2	2	EA	2.09	4.18
40	618561	Pad, Alcohol Cleansing ( 20 ) Pads	1	1	EA	2.09	2.09

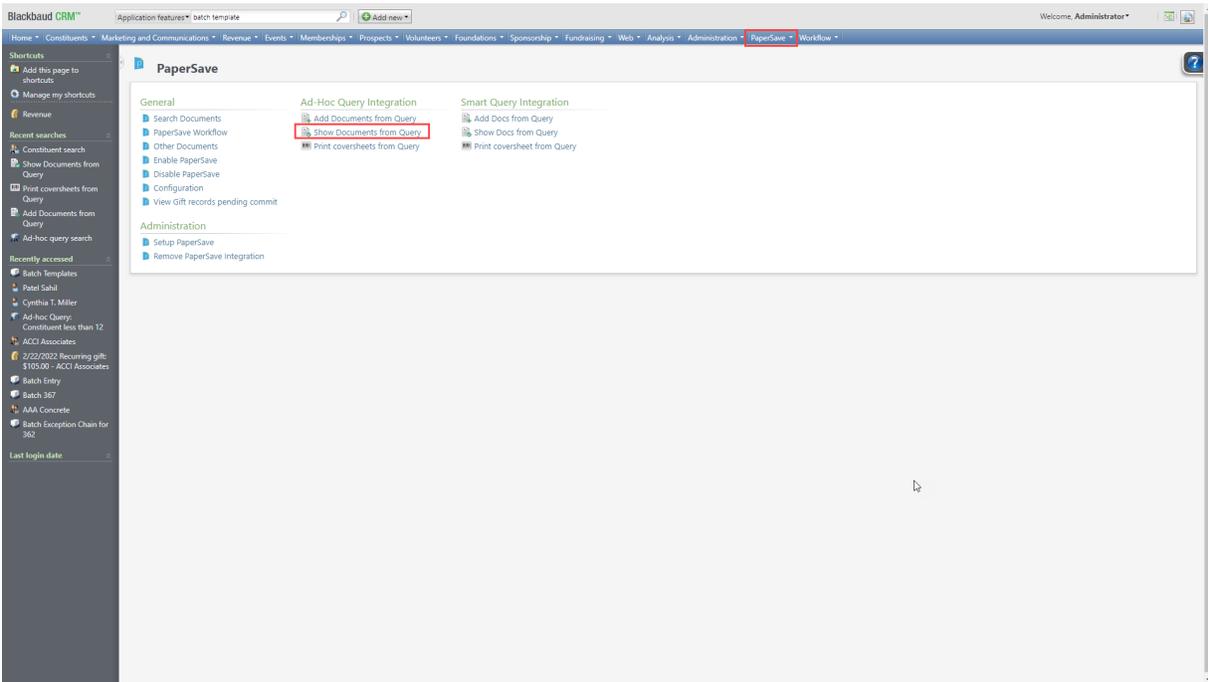
1 / 2 Franke Foodservice Supply, L...

7) To view the saved record and associated documents, you can refer to the [Show Documents from Query](#).

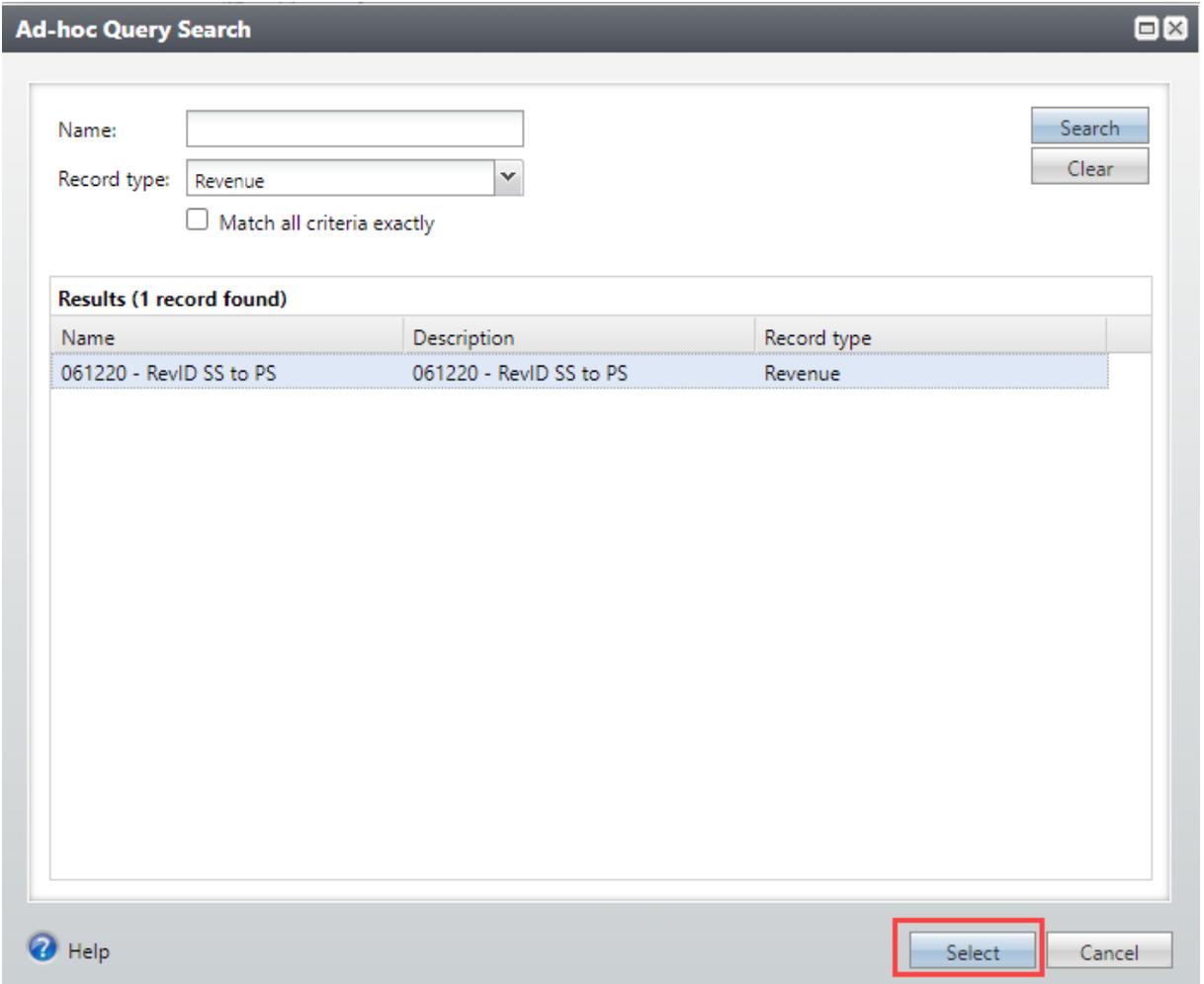
# Show documents from query

To view documents associated with the query record, you have to follow the below steps:

1) Go to "PaperSave" Tab and select **Show Documents from Query** from Ad-Hoc Query Integration group as shown in the below screen.

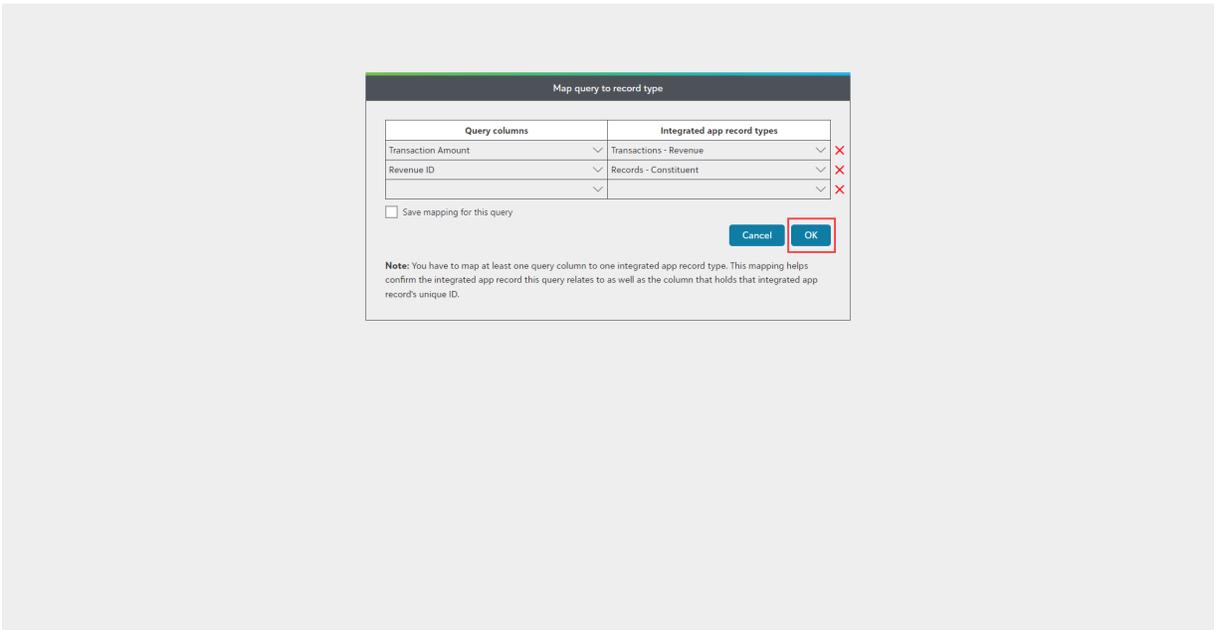


2) An Ad-hoc Query Search dialog box appears. Select Record Type (for example, Revenue) from the drop-down and click on search. Now, Ad-hoc query result appears. Select the desire query (if there are multiple results) and click on **Select** button in dialog box as shown below.



3) Now, you get redirected to the "Documents related to query" window in the browser as shown in the below screen. Here, you have to map multiple query columns with the different record type from the drop down list and click on **OK** to map the query. Also, you can check the box to save the current mapping directly from the dialog box.

**Note:** If you save the current mapping, then you will be automatically redirected to the document list in the Documents related to query page the next time, you want to show documents from this query.



4) Once you click on **OK**, you are redirected to the Documents related to query page, where you can see a list of the related document based on the mapped query as shown below.

ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Order Date	Customer No
24740	Revenue Documentation Supply In...	03-22-2022 05:14:40 PM	paper@papersavecloud.com	\$1,000.00	Revenue	Revenue Documentation	03-24-2022	1000000000
24741	Revenue Documentation Supply In...	03-22-2022 05:14:40 PM	paper@papersavecloud.com	\$125.00	Revenue	Revenue Documentation	03-24-2022	1000000000
24742	Revenue Documentation Supply In...	03-22-2022 05:14:40 PM	paper@papersavecloud.com	\$100.00	Revenue	Revenue Documentation	03-24-2022	1000000000
24743	Revenue Documentation Supply In...	03-22-2022 05:14:40 PM	paper@papersavecloud.com	\$350.00	Revenue	Revenue Documentation	03-24-2022	1000000000
24744	Revenue Documentation Supply In...	03-22-2022 05:14:40 PM	paper@papersavecloud.com	\$50.00	Revenue	Revenue Documentation	03-24-2022	1000000000
24745	Revenue Documentation Supply In...	03-22-2022 05:14:40 PM	paper@papersavecloud.com	\$15,000.00	Revenue	Revenue Documentation	03-24-2022	1000000000
24746	Revenue Documentation Supply In...	03-22-2022 05:14:40 PM	paper@papersavecloud.com	\$5,000.00	Revenue	Revenue Documentation	03-24-2022	1000000000

5) From documents related to query page, you can navigate to different PaperSave Areas, view the list of query records, save/clear mappings and view/edit the document. This page also contains the list toolbar with the following options:

**Filter:** This option allows you to narrow down the items in the list by applying filter conditions. Learn more about [Filter](#).

**Refresh:** This option updates the recent changes in the show document list.

**Show Grouping:** This options helps you to cluster the items in the list based on the desired header fields. Learn more about [Show Grouping](#).

**Choose Fields:** This option allows you to set desired preferences for the fields to be displayed in the current list using Choose Fields. Learn more about [Choose Fields](#).

**Export to Excel:** This option exports the current list of items to Microsoft Excel Sheet. Learn more about [Export to Excel](#).

**Note:** When you save the current mapping, you wouldn't have to map the fields again in future. If the mappings are saved, then **Save Mappings** title will be changed to **Clear Mappings**. You can click on **Clear Mappings** to create the new mappings.

6) Click on the ID hyperlink or double-click on a row to open the document in the item viewer, **validate** the required values in the profile fields, apply annotations (if desired) and click on **X** to update the document within the selected record.

The screenshot displays a software interface for viewing and managing documents. At the top, a table lists related revenue records with columns for Constituent ID, Constituent Name, Transaction Type, Transaction Amount, Payment Method, Transaction Date, Transaction Description, and Batch Number. The main area shows an invoice document for Franke Foodservice Supply, Inc. The invoice includes contact information, a delivery address for Burger King, and a list of parts ordered. The right sidebar contains metadata such as ID: 24740, Batch, Order Date (03-25-2022), and Customer No (11062-018811). A red box highlights the 'X' icon in the top right corner of the document viewer, which is used to update the document.

Related Revenue	Constituent ID	Constituent Name	Transaction Type	Transaction Amount	Payment Method	Transaction Date	Transaction Description	Batch Number
1		Joseph P. Diresta	Payment	\$1000.00	Check	03-16-2003		

**Invoice**

Invoice no: 84949873  
Invoice date: 19-Feb-2016  
Order no: 37496168  
PO #: Autoshipment-6602  
Order from: Scheidegger, Mike  
Shipping date: 02/19/16  
Cust Service Rep: Myles Couyoumjian  
Store no: 5022333  
Customer no: 11062-018811  
Customer store no: 7166

**Reference:**  
Payment terms: Net 30  
Delivery terms: FOB Shipping Point  
Ship via: UPS Ground  
GST #: 869575928RT0001  
Tracking #: 1Z19E0W30334789953

**Delivery Address**  
Burger King 7166  
1197 BERKSHIRE BLVD  
WYOMISSING, PA 19610-1245  
USA

updated delivery address

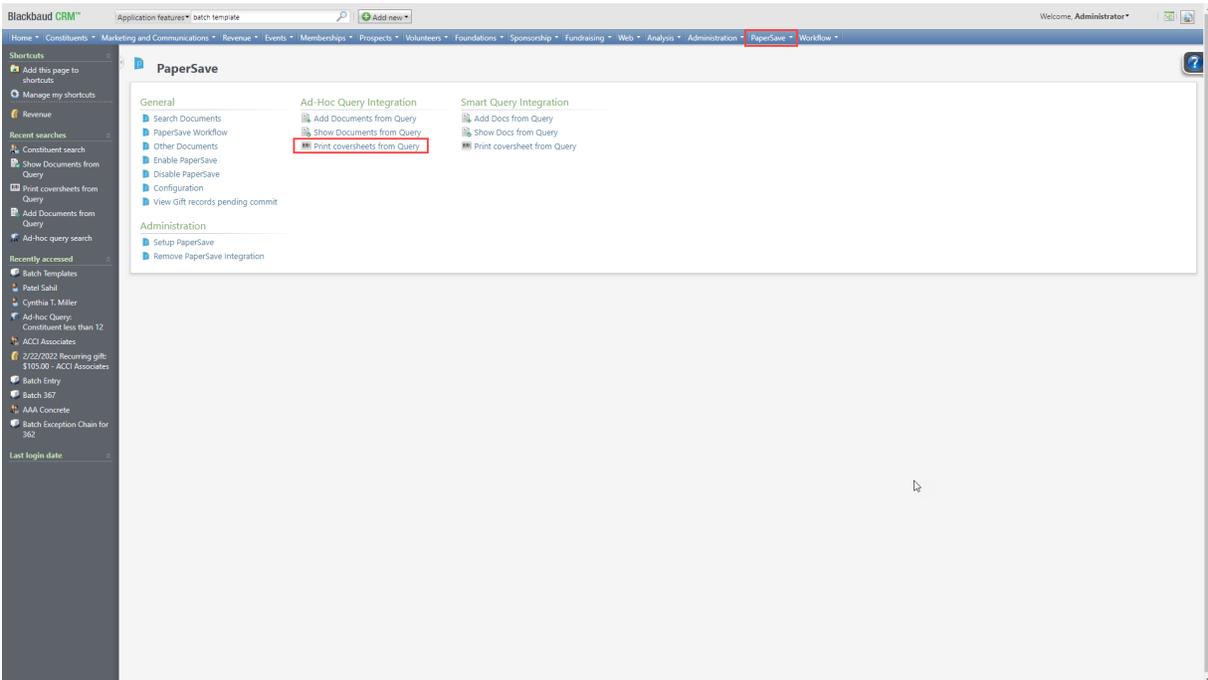
Attn: Restaurant Manger  
Comment:

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
10	492434	First Aid Burn Cream (10 pack)	1	1	EA	2.09	2.09
20	618562	Ointment, First Aid Antibiotic (10) Packs	1	1	EA	2.09	2.09
30	492433	Gel, Burn Relief 3.5gm (6 per pack)	2	2	EA	2.09	4.18

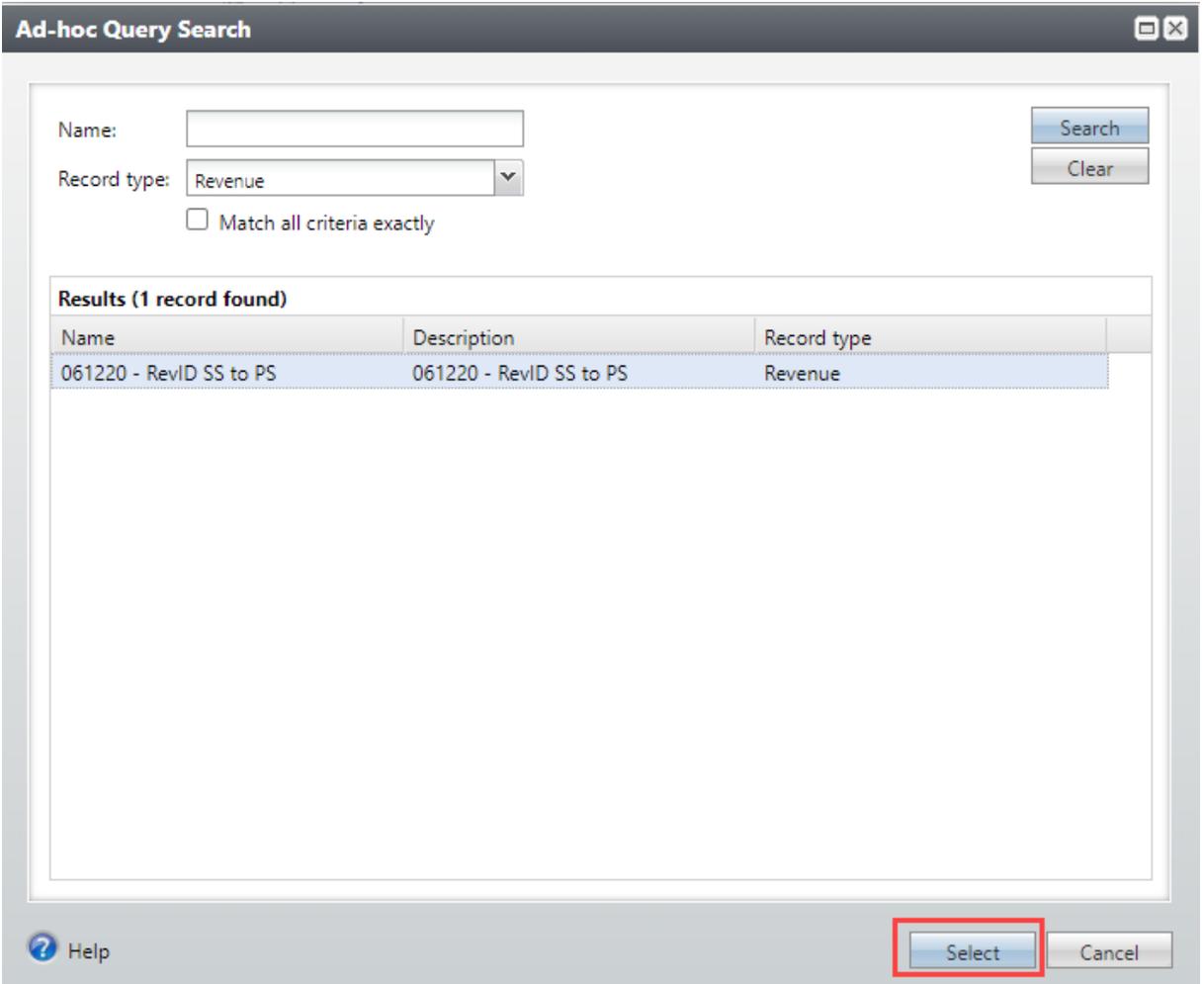
# Print coversheets from query

Follow the below given steps to print coversheets from query, you need to :

1) Go to "PaperSave" Tab and select **Print Coversheets from Query** from Ad-Hoc Query Integration group as shown in the below screen.

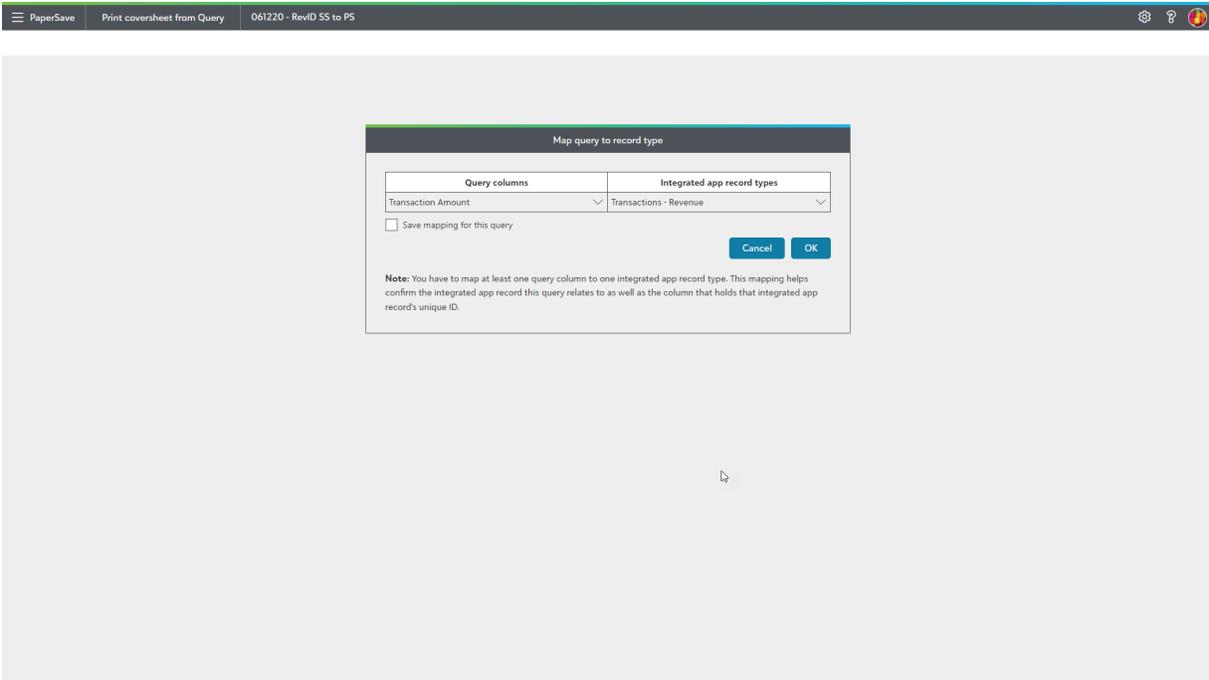


2) An Ad-hoc Query Search dialog box appears. Select Record Type (**for example**, Revenue) from the drop-down and click on search. Now, Ad-hoc query result appears. Select the desire query (if there are multiple results) and click on **Select** button in dialog box as shown below.



5) You get redirected to PaperSave's "Print coversheet from Query" window in the browser as shown in the below screen. Here, you need to map 'Query columns' with the PaperSave supported Blackbaud CRM record types in the drop down list and click on **OK** to map the query. You can check the box to "**Save mapping for this query**" directly from the dialog box.

**Note:** If you save the current mapping, then you will be automatically get redirected to the File capture options page next time when you print coversheet from query for the same Record type.



6) Once you click on **OK**, you get prompted with the certain Generate barcodes options as shown below. Here, you can choose the desired document type and any of the following barcode print options, and click on **Generate** button.

- **Generate a single barcode for each selected document type using default field values:** This will create a single coversheet for each of the document types selected in the Document Type pane for each record in the Query result. When you will select more than one document type, then only this option will be available in the drop-down list.
- **Set the field values for the selected document type:** When you will select this option, it will allow you to define the field values before generating the barcode coversheet. This option will be displayed in the drop-down list only when a user selects single document type.

**Note:** While defining the field values, you must fill all the required fields. Else an error will occur with the message "All required fields have not been entered for the Document Type: (Name of the selected document type)"

PaperSave | Print coversheet from Query | 061220 - RevID SS to PS | Generate Barcodes | View Query Records | Print Item | Save Mappings

### Generate Barcodes

Select document type\*:

Revenue Documentation

Select barcode print option\*:

Generate a single barcode for each selected document type using default field values  
Set the field values for the selected document type

☰

PaperSave | Print coversheet from Query | 061220 - RevID SS to PS | Generate Barcodes | View Query Records | Print Item | Save Mappings

### Generate Barcodes

Select document type\*:

Revenue Documentation

Select barcode print option\*:

Set the field values for the selected document type

Set field values:

Order Date :  
03-25-2022

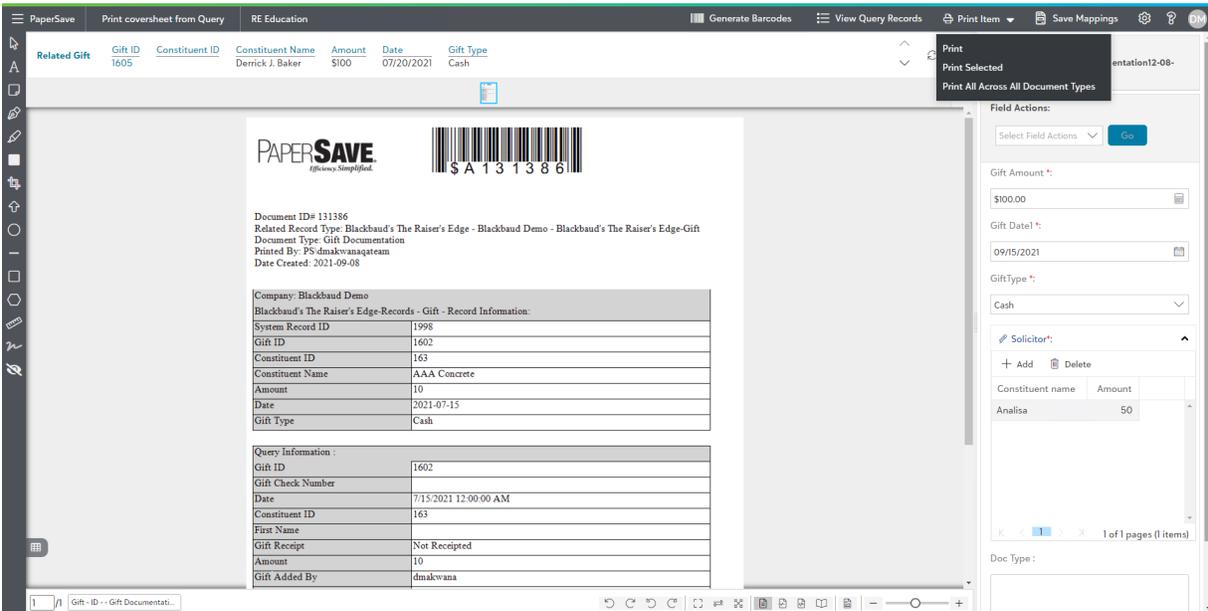
Customer No :  
11011-86253

Generate

☰

**Note:** If the mappings are saved, then the Save Mappings option will be changed to Clear Mappings. You can click on **Clear Mappings** to create the new mappings.

7) Now, a barcode will be generated for all the query records and you will be navigated to an item viewer, as shown below. Here, you can navigate to different PaperSave Areas, Generate another Barcode, view a list of the query records, print the barcodes, and save/clear mappings.



The screenshot displays the PaperSave software interface. The main window shows a document viewer with the following content:

**PAPER SAVE**  
Efficiency. Simplified.

Document ID# 131386  
Related Record Type: Blackbaud's The Raiser's Edge - Blackbaud Demo - Blackbaud's The Raiser's Edge-Gift  
Document Type: Gift Documentation  
Printed By: PS-dmakwanaqateam  
Date Created: 2021-09-08

Company: Blackbaud Demo	
Blackbaud's The Raiser's Edge-Records - Gift - Record Information:	
System Record ID	1998
Gift ID	1602
Constituent ID	163
Constituent Name	AAA Concrete
Amount	10
Date	2021-07-15
Gift Type	Cash

Query Information :	
Gift ID	1602
Gift Check Number	
Date	7/15/2021 12:00:00 AM
Constituent ID	163
First Name	
Gift Receipt	Not Received
Amount	10
Gift Added By	dmakwana

The sidebar on the right contains the following options:

- Print
- Print Selected
- Print All Across All Document Types
- Field Actions: Select Field Actions, Go
- Gift Amount: \$100.00
- Gift Date: 09/15/2021
- Gift Type: Cash
- Solicitor: + Add, - Delete
- Table with columns: Constituent name, Amount. Row: Analisa, 50
- Page indicator: 1 of 1 pages (1 Items)
- Doc Type:

8) Now, click on **Print Item** and select any of the following Print options as per your requirement.

- **Print:** This option will print the coversheet currently displayed in an item viewer.
- **Print Selected:** This option will print the coversheets that you have selected using the checkbox in an unsubmitted item list
- **Print All Across All Document Types:** This option will print all the coversheets generated for all the document type (available in Generate Barcodes options)

9) Once you select the relevant print option, a print dialog box appears, as shown below. Click on **Print** to proceed with printing the coversheet or click on **Cancel** to exit the dialog box without performing print operation.

**PAPER SAVE**  
*Efficiency. Simplified.*

  
 \$ A 13 13 8 8

Document ID# 131388  
 Related Record Type: Blackbaud's The Raiser's Edge - Blackbaud Demo - Blackbaud's The Raiser's Edge-Gift  
 Document Type: Gift Documentation  
 Printed By: ██████████  
 Date Created: 2021-09-08

Company: Blackbaud Demo

Blackbaud's The Raiser's Edge-Records - Gift - Record Information:	
System Record ID	2000
Gift ID	1604
Constituent ID	163
Constituent Name	AAA Concrete
Amount	100
Date	2021-07-20
Gift Type	Cash

Query Information :

Gift ID	1604
Gift Check Number	
Date	7/20/2021 12:00:00 AM
Constituent ID	163
First Name	
Gift Receipt	Not Received
Amount	100
Gift Added By	██████████
Gift Type	Cash
Check Date	
Gift Is Anonymous	No
Solicitor Name	
Solicitor Amount	
Soft Credit Amount	
Constituent Name	AAA Concrete

There are additional details which unfortunately can not be displayed. Please access the document from within PaperSave to view the rest of the field data.

Print 1 sheet of paper

Destination HP LaserJet Professic ▾

Pages All ▾

Copies 1

Layout Portrait ▾

More settings ▾

Print
Cancel

Gift Check Number	
Date	7/20/2021 12:00:00 AM
Constituent ID	139
First Name	
Gift Receipt	Not Receipted
Amount	2000
Gift Added By	
Gift Type	Cash
Check Date	
Gift Is Anonymous	No
Solicitor Name	
Solicitor Amount	
Soft Credit Amount	
Constituent Name	All Track International

There are additional details which unfortunately can not be displayed. Please access the document from within PaperSave to view the rest of the field data.



Document ID# 131386  
 Related Record Type: Blackbaud's The Raiser's Edge - Blackbaud Demo - Blackbaud's The Raiser's Edge-Gift  
 Document Type: Gift Documentation  
 Printed By: [Redacted]  
 Date Created: 2021-09-08

Company: Blackbaud Demo	
Blackbaud's The Raiser's Edge-Records - Gift - Record Information:	
System Record ID	1998
Gift ID	1602
Constituent ID	163
Constituent Name	AAA Concrete
Amount	10
Date	2021-07-15
Gift Type	Cash

Query Information :	
Gift ID	1602

Print 11 sheets of paper

Destination (redirecte ▼)

Pages All ▼

Copies 1

Layout Portrait ▼

Color Color ▼

More settings ▼

10) After the print operation is performed, a confirmation message will be prompted as shown below. If you click on **Yes**, then it will remove the printed barcode coversheets from the unsubmitted item list and on **No**, it will keep the coversheets in unsubmitted item list so that you can print again (in case print operation failed).

PaperSave | Print coversheet from Query | RE Education | Generate Barcodes | View Query Records | Print Item | Save Mappings | Refresh

Related Gift	Gift ID	Constituent ID	Constituent Name	Amount	Date	Gift Type
	1606	139	All Track International	\$2000	07/20/2021	Cash




Document ID# 131392  
 Related Record Type: Blackbaud's The Raiser's Edge - Blackbaud Demo - Blackbaud's The Raiser's Edge-Gift  
 Document Type: DM RE Gift  
 Printed By: [User]  
 Date Created: 2021-09

**Print successfully?**

Please confirm that all the coversheets were printed successfully. Clicking on Yes will delete the selected coversheets from PaperSave and clicking on No will leave the selected coversheets in unsubmitted item list.

Company: Blackbaud	
Blackbaud's The Raiser's Edge	
System Record ID	
Gift ID	
Constituent ID	
Constituent Name	
Amount	
Date	2021-07-15
Gift Type	Cash

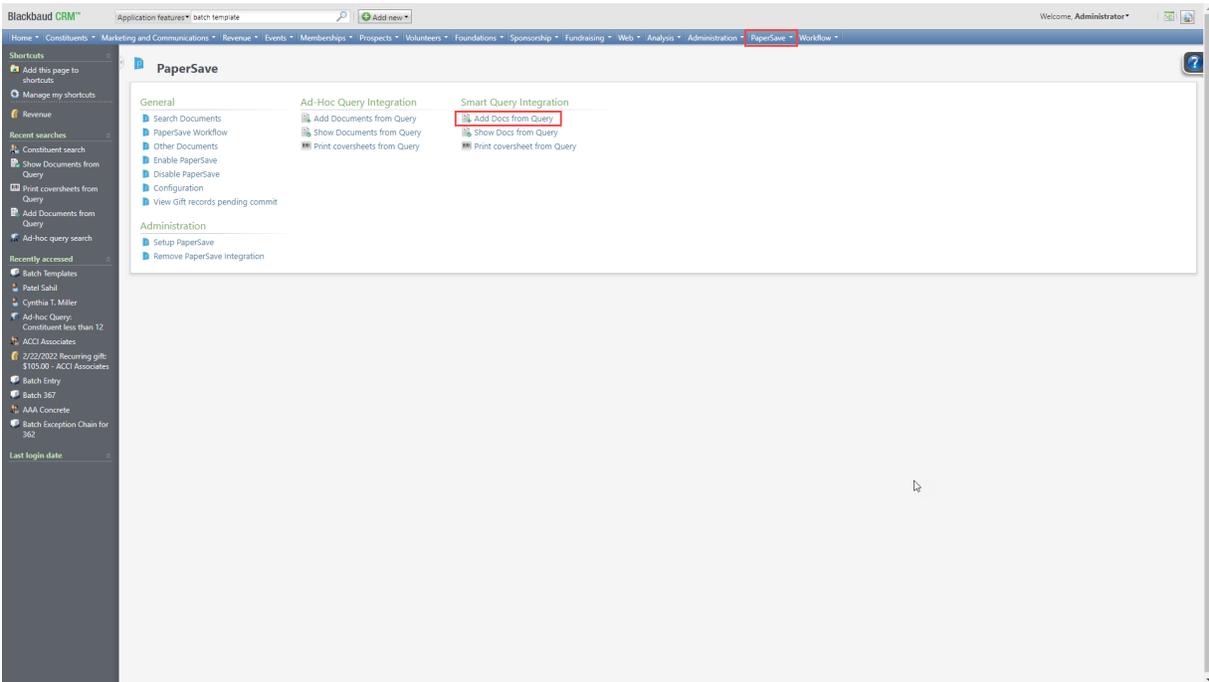
Query Information :	
Gift ID	1602
Gift Check Number	
Date	7/15/2021 12:00:00 AM
Constituent ID	163
First Name	
Gift Receipt	Not Received
Amount	10
Gift Added By	
Gift Type	Cash

GR - ID -- DM RE GR16-08-2

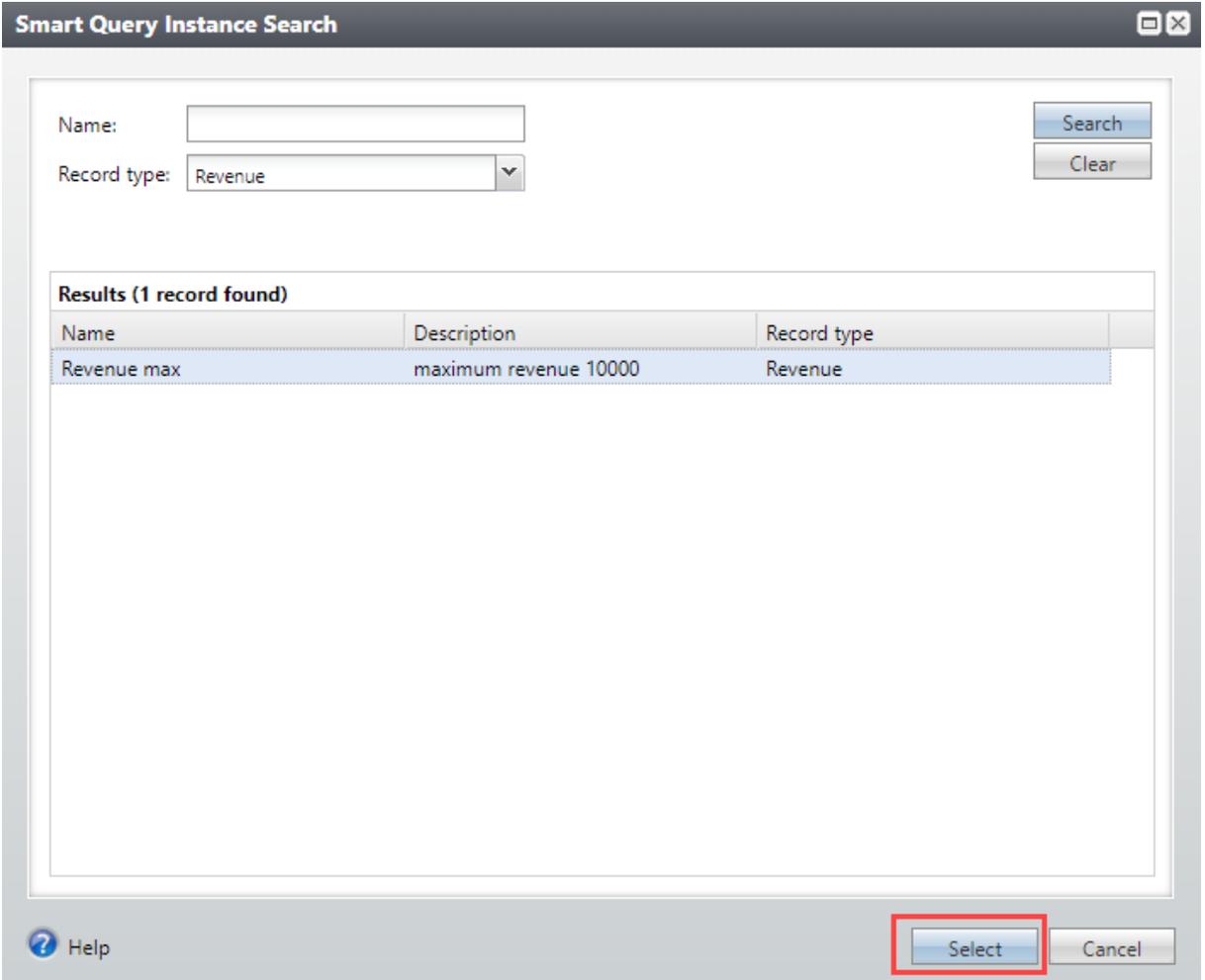
# Add docs from query

To add documents from query for Smart query integration, follow the below given steps:

1) Go to "PaperSave" Tab and select **Add Docs from Query** from Smart Query Integration group as shown in the below screen.

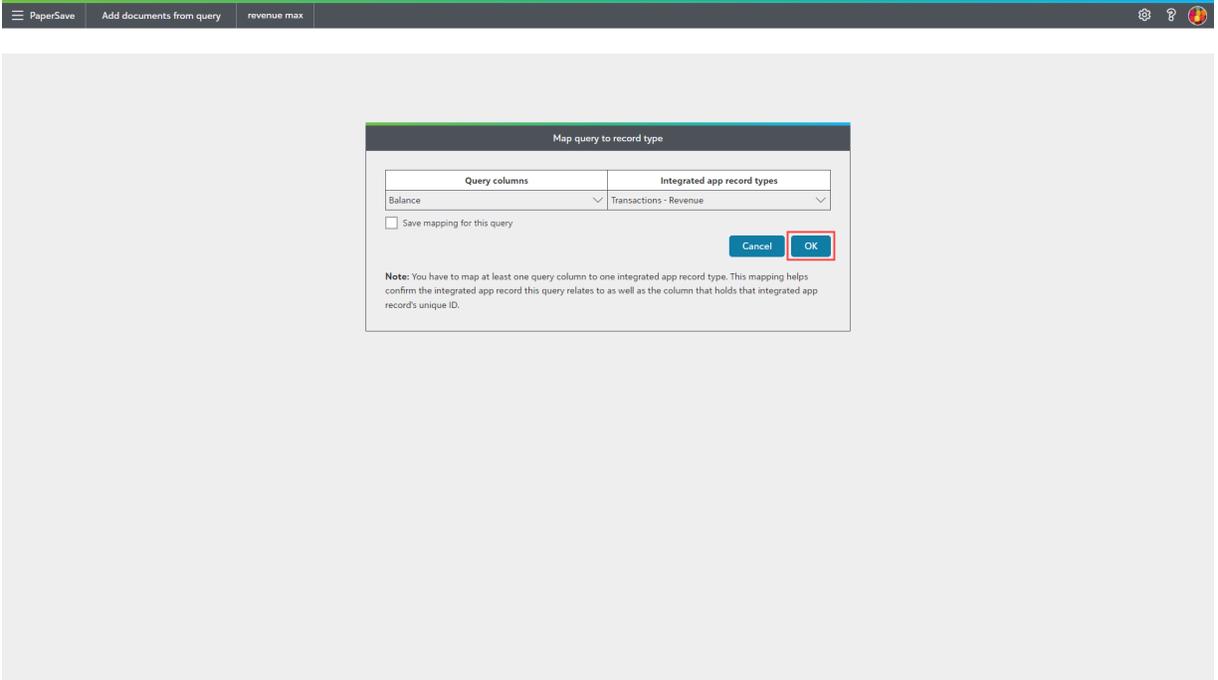


2) A Smart Query Instance Search dialog box appears. Select Record Type (for example, Revenue) from the drop-down and click on search. Now, smart query result appears. Select the desire query (if there are multiple results) and click on **Select** button in dialog box as shown below.



2) You get redirected to PaperSave's "Add documents from query" window in the browser as shown in the below screen. Here, you need to map 'Query columns' with the PaperSave supported Blackbaud CRM record types in the drop down list and click on **OK** to map the query. You can check the box to "**Save mapping for this query**" directly from the dialog box.

**Note:** If you save the current mapping, then you will be automatically redirected to the File capture options page the next time when you add documents from query for the same Record type.



3) Once you click on **OK**, you are redirected to the File capture options panel as shown in the below screen. You can also use the navigation arrows to move to the next record in the query to add a document.



PaperSave | Add documents from query | revenue max | Revenue Documentation | View Query Records | Save | Save Mappings

Related Revenue | Constituent ID | Constituent Name | Transaction Type | Transaction Amount | Payment Method | Transaction Date | Transaction D | Refresh

**Frankie Foodservice Supply, Inc**  
 800 AVIATION PKWY  
 SMYRNA, TN 37167-2581  
 Acct Rec (P): 1-888-800-0623 (P): 615-462-5460  
 Acct Rec (F): 1-877-700-0623  
 Cust Svc (P): 1-800-877-5178 (P): 615-462-4000  
 Cust Svc (F): 1-877-538-6882

**Invoice Address**  
 GPS Hospitality, LLC.  
 2100 RIVEREDGE PKWY  
 ATLANTA, GA 30328-4693  
 USA

**Delivery Address**  
 Burger King 13161  
 1205 W HUNTER ST  
 LOGAN, OH 43138-1011  
 USA

Comment:



### Invoice

INVOICE NO: 84949880  
 Invoice date: 19-Feb-2016  
 Order no: 37532094  
 PO #: 13161  
 Order from:  
 Shipping date: 02/19/16  
 Cust Service Rep: Myles Couyoumjian  
 Store no: 5020680  
 Customer no: 11062-018811  
 Customer store no: 13161

**Reference:**  
 Payment terms: Net 30  
 Delivery terms: FOB Shipping Point  
 Ship via: UPS Ground  
 GST #: 869575928RT0001  
 Tracking #: 1Z19E0W30334788785

ID: 24747  
 Batch: food supply 11011

**Document Profile**  
 Order Date:  
 03-25-2022  
 Customer No:  
 11062018811

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UCM	Unit price USD	Totals USD
<b>Parts</b>							
10	421728	Tip, Rubber Feet (Set of 4)	3	3	P4	6,96	20,88
20	610972	TONG, LIFT AND GRIP S/S 12"	3	3	EA	5,16	15,48
<b>Misc</b>							
10	SLIPDISC	Slipdisc	1	1	EA	10,45	10,45

Page # 1 / 1

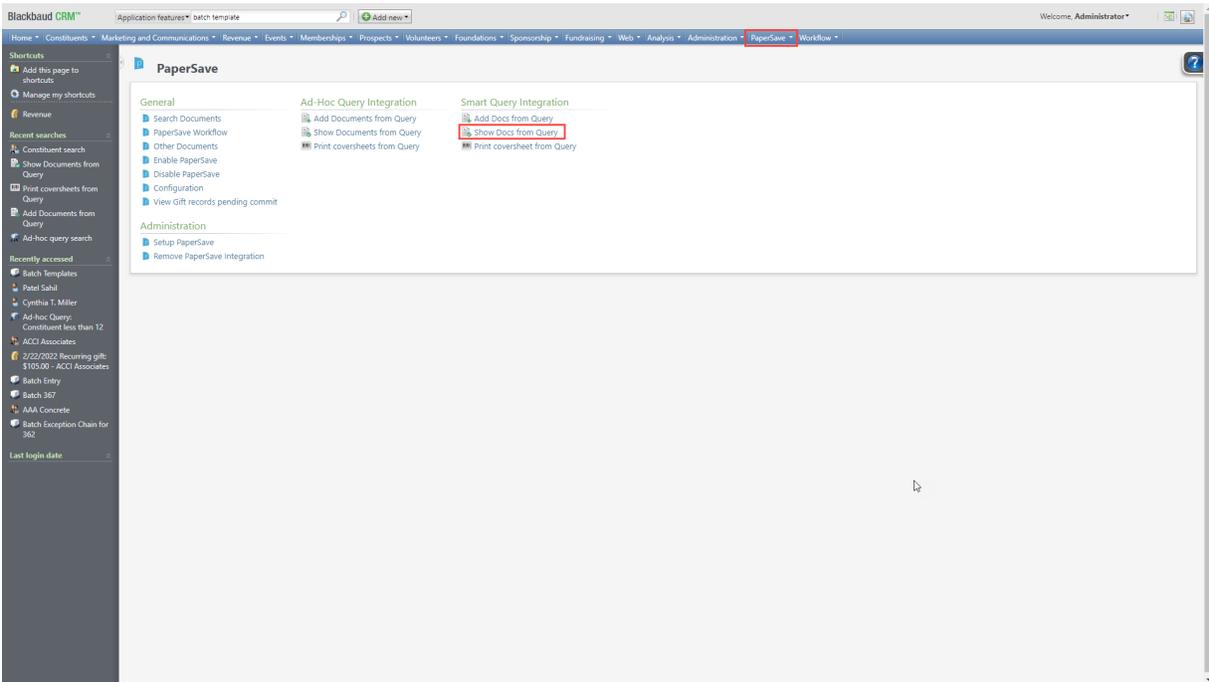
1 | Frankie Foodservice Supply, L.

6) To view the saved record and associated documents, you can refer to the [Show Documents from Query](#).

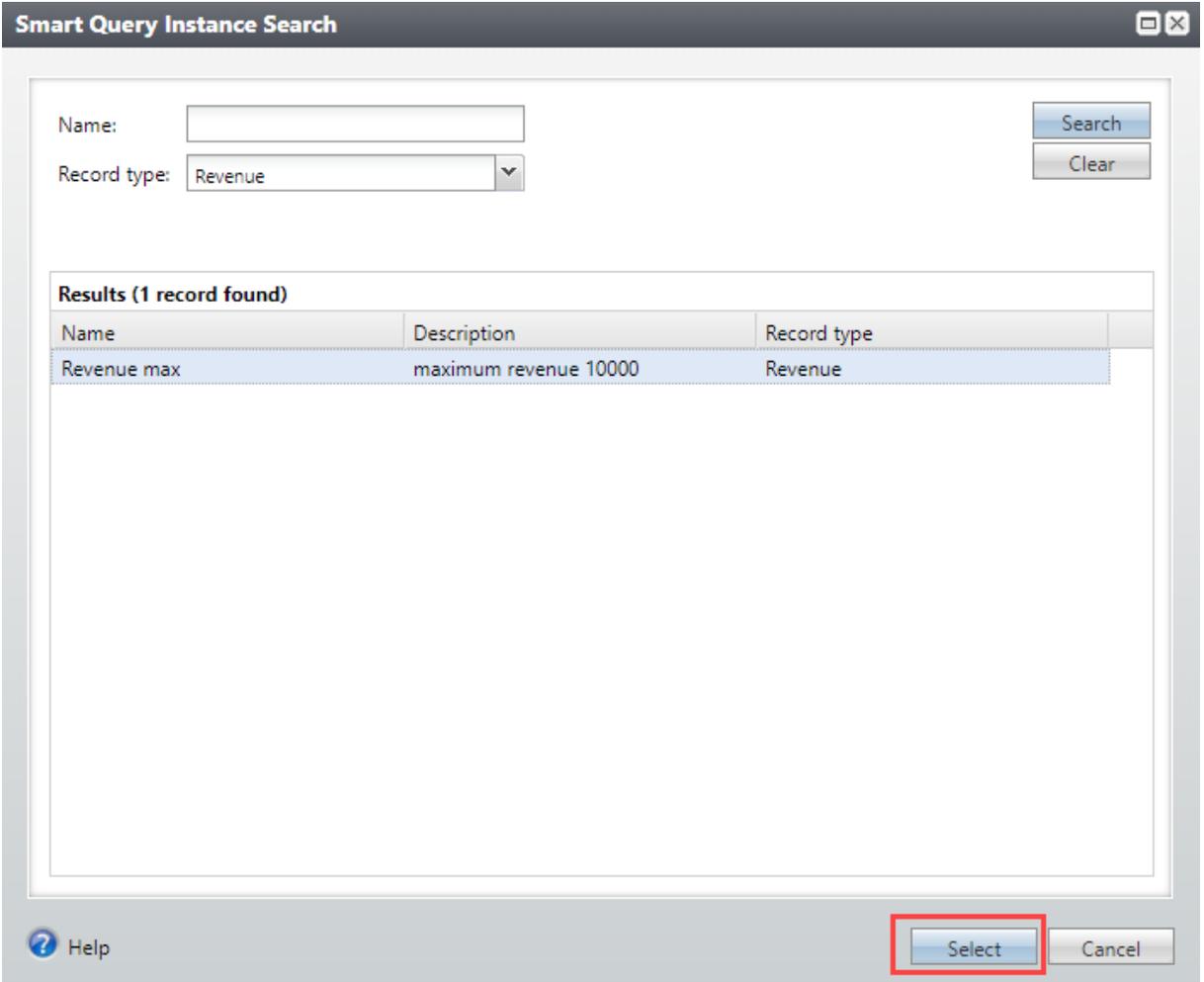
# Show docs from query

To view documents associated with the query record of Smart query integration, follow the below given steps:

1) Go to "PaperSave" Tab and select **Show Docs from Query** from Smart Query Integration group as shown in the below screen.

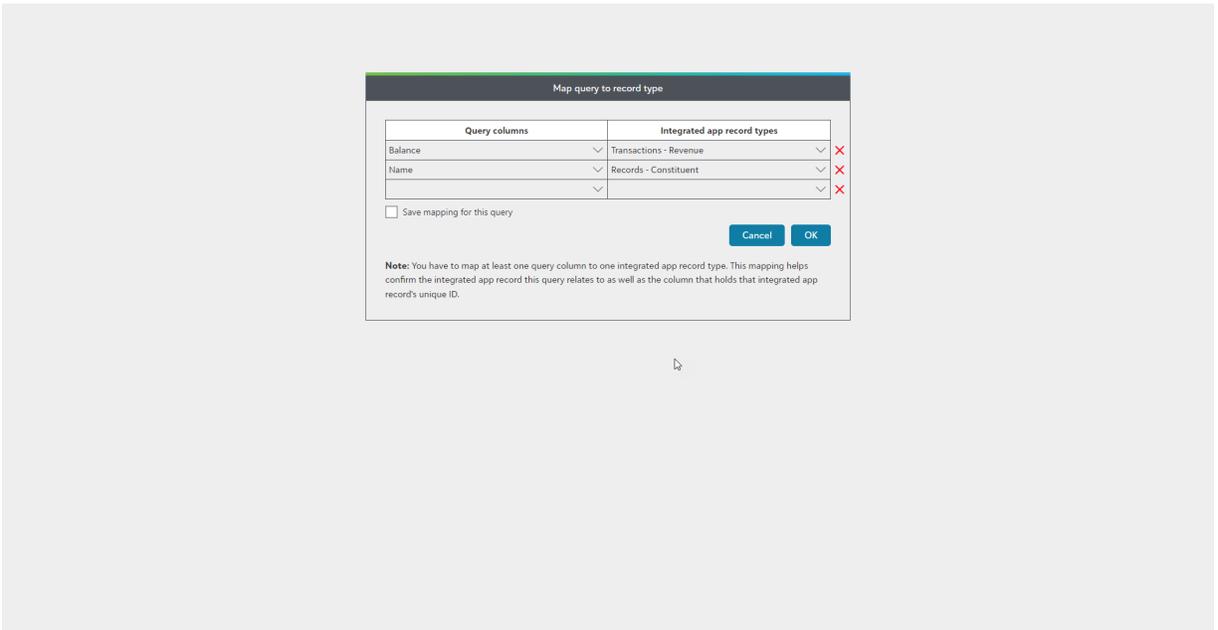


2) A Smart Query Instance Search dialog box appears. Select Record Type (for example, Revenue) from the drop-down and click on search. Now, smart query result appears. Select the desire query (if there are multiple results) and click on **Select** button in dialog box as shown below.



5) Now, you will be redirected to the "Documents related to query" window in the browser as shown in the below screen. Here, you have to map multiple query columns with the different record type from the drop down list and click on **OK** to map the query. Also, you can check the box to save the current mapping directly from the dialog box.

**Note:** If you save the current mapping, then you will be automatically redirected to the document list in the Documents related to query page the next time, you want to show documents from this query.



6) Once you click on OK, you will be redirected to the Documents related to query page, where you will see a list of the related document based on the mapped query as shown below.

PaperSave Documents related to query revenue max													
View Query Records Save Mappings													
FILTER REFRESH SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL													
ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Order Date	Customer No	Revenue ID	Constituent ID	Consti		
24740	Revenue Documentation Supply, Inc	03-22-2022 05:14:40 PM	cloud.com	\$1,000.00	Revenue	Revenue Documentation	03-25-2022	11067	\$1,000.00	1-ae37-8b2e-			
24744	Revenue Documentation Supply, Inc	03-22-2022 05:14:40 PM	cloud.com	\$50.00	Revenue	Revenue Documentation	03-24-2022	11067	\$50.00	1-ae37-8b2e-			
24748	Revenue Documentation Supply, Inc	03-22-2022 06:00:35 PM	cloud.com	\$1,000.00	Revenue	Revenue Documentation	03-25-2022	11067	\$1,000.00	1-ae37-8b2e-			
24749	Revenue Documentation Supply, Inc	03-22-2022 06:00:35 PM	cloud.com	\$50.00	Revenue	Revenue Documentation	03-25-2022	11067	\$50.00	1-ae37-8b2e-			
24750	Revenue Documentation Supply, Inc	03-22-2022 06:00:35 PM	cloud.com	\$900.00	Revenue	Revenue Documentation	03-25-2022	11067	\$900.00	1-ae37-8b2e-			
24751	Revenue Documentation Supply, Inc	03-22-2022 06:00:35 PM	cloud.com	\$750.00	Revenue	Revenue Documentation	03-25-2022	11067	\$750.00	1-ae37-8b2e-			
24752	Revenue Documentation Supply, Inc	03-22-2022 06:00:35 PM	cloud.com	\$7,000.00	Revenue	Revenue Documentation	03-25-2022	11067	\$7,000.00	1-ae37-8b2e-			
24753	Revenue Documentation Supply, Inc	03-22-2022 06:00:35 PM	cloud.com	\$800.00	Revenue	Revenue Documentation	03-25-2022	11067	\$800.00	1-ae37-8b2e-			
24754	Revenue Documentation Supply, Inc	03-22-2022 06:00:35 PM	cloud.com	\$200.00	Revenue	Revenue Documentation	03-25-2022	11067	\$200.00	1-ae37-8b2e-			
24755	Revenue Documentation Supply, Inc	03-22-2022 06:00:35 PM	cloud.com	\$3,750.00	Revenue	Revenue Documentation	03-25-2022	11067	\$3,750.00	1-ae37-8b2e-			

7) From documents related to query page, you can navigate to different PaperSave Areas, view the list of query records, save/clear mappings and view/edit the document. This page also contains the list toolbar with the following options:

**Filter:** This option allows you to narrow down the items in the list by applying filter conditions. Learn more about [Filter](#).

**Refresh:** This option updates the recent changes in the show document list.

**Show Grouping:** This options helps you to cluster the items in the list based on the desired header fields. Learn more about [Show Grouping](#).

**Choose Fields:** This option allows you to set desired preferences for the fields to be displayed in the current list using Choose Fields. Learn more about [Choose Fields](#).

**Export to Excel:** This option exports the current list of items to Microsoft Excel Sheet. Learn more about [Export to Excel](#).

**Note:** When you save the current mapping, you wouldn't have to map the fields again in future. If the mappings are saved, then **Save Mappings** title will be changed to **Clear Mappings**. You can click on **Clear Mappings** to create the new mappings.

8) Click on the ID hyperlink or double-click on a row to open the document in the item viewer, **validate** the required values in the profile fields, apply annotations (if desired) and click on **X** to update the document within the selected record.

The screenshot displays a software interface for viewing and managing documents. The central area shows an invoice from Franke Foodservice Supply, Inc. to GPS Hospitality, LLC. The invoice details include:

- Invoice no:** 84949873
- Invoice date:** 19-Feb-2016
- Order no:** 37496168
- PO #:** Autoshipment-6602
- Order from:** Scheidegger, Mike
- Shipping date:** 02/19/16
- Cust Service Rep:** Myles Couyoumjian
- Store no:** 5022333
- Customer no:** 11062-018811
- Customer store no:** 7166

The invoice also lists payment terms (Net 30), delivery terms (FOB Shipping Point), and shipping information (UPS Ground, Tracking #: 1Z19E0W30334789953).

Below the invoice details is a table of items:

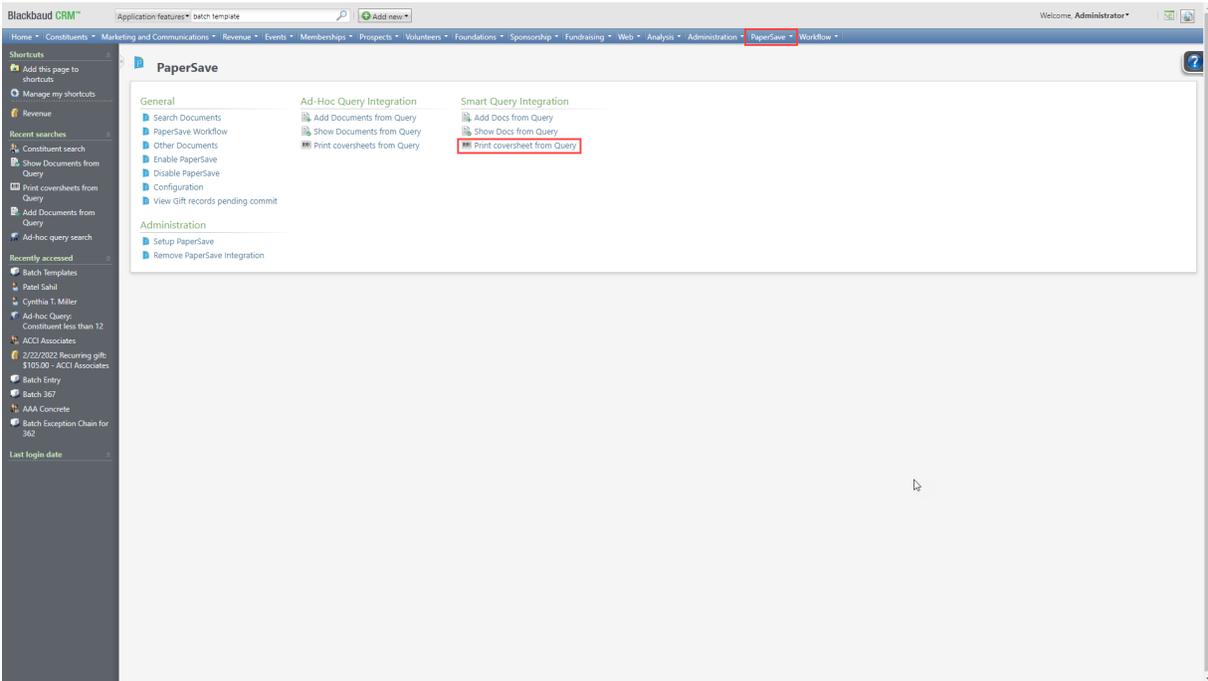
Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UCM	Unit price USD	Totals USD
<b>Parts</b>							
10	492434	First Aid Burn Cream (10 pack)	1	1	EA	2.09	2.09
20	618562	Ointment, First Aid Antibiotic (10) Packs	1	1	EA	2.09	2.09
30	492433	Gel, Burn Relief 3.5gm (6 per pack)	2	2	EA	2.09	4.18

The right-hand sidebar contains the following information:

- ID:** 24740
- Batch:**
- Field Actions:** Select Field Actions (Go)
- Order Date:** 03-25-2022
- Customer No:** 11062-018811

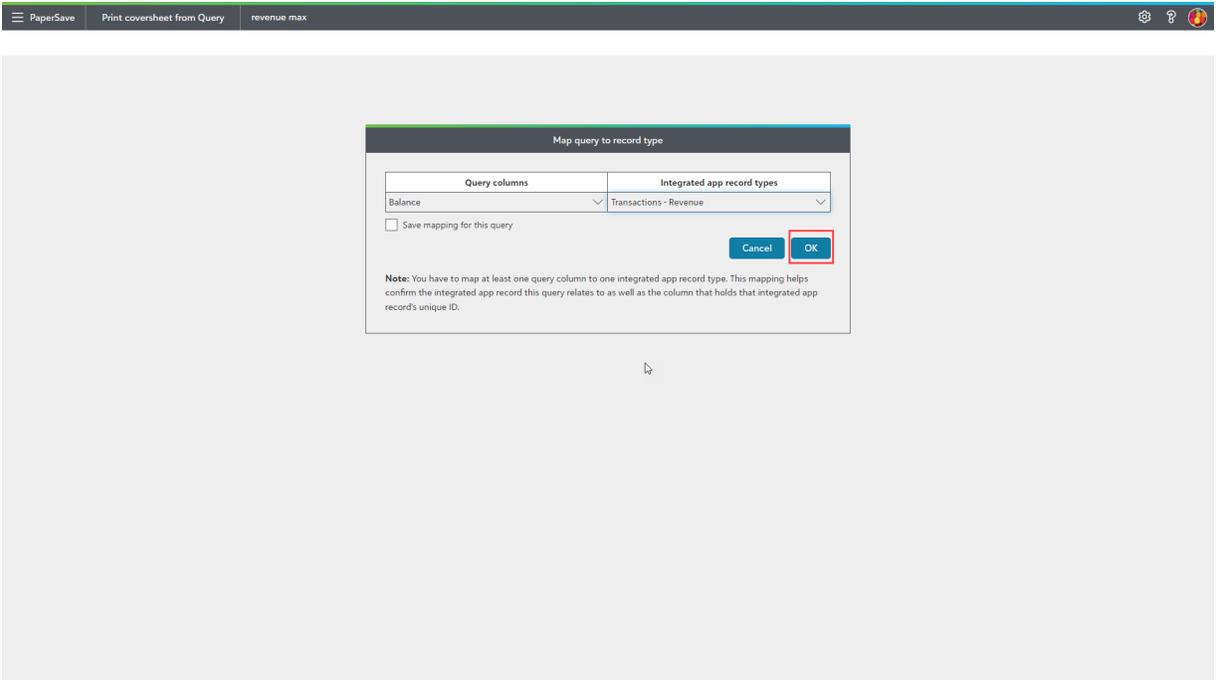
# Print coversheets from query

To print coversheets from query, you need to follow the below given steps:



5) You will be redirected to PaperSave's "Print coversheet from Query" window in the browser as shown in the below screen. Here, you need to map 'Query columns' with the PaperSave supported Raiser's Edge record types in the drop down list and click on **OK** to map the query. You can check the box to "**Save mapping for this query**" directly from the dialog box.

**Note:** If you save the current mapping, then you will be automatically redirected to the File capture options page the next time when you print coversheet from query for the same Record type.



6) Once you click on **OK**, you will be prompted with the certain Generate barcodes options as shown below. Here, you can choose the desired document type and any of the following barcode print options, and click on **Generate** button.

- **Generate a single barcode for each selected document type using default field values:** This will create a single coversheet for each of the document types selected in the Document Type pane for each record in the Query result. When you will select more than one document type, then only this option will be available in the drop-down list.
- **Set the field values for the selected document type:** When you will select this option, it will allow you to define the field values before generating the barcode coversheet. This option will be displayed in the drop-down list only when a user selects single document type.

**Note:** While defining the field values, you must fill all the required fields. Else an error will occur with the message "All required fields have not been entered for the Document Type: (Name of the selected document type)"

Generate Barcodes

revenue max

Generate Barcodes View Query Records Print Item Save Mappings

Select document type:

Revenue Documentation

Select barcode print option\*:

Generate a single barcode for each selected document type using default field values

Set the field values for the selected document type

Generate Barcodes

revenue max

Generate Barcodes View Query Records Print Item Save Mappings

Select document type:

Revenue Documentation

Select barcode print option\*:

Set the field values for the selected document type

Set field values:

Order Date : 03-25-2022

Customer No : 11062018811

Generate

**Note:** If the mappings are saved, then the Save Mappings option will be changed to Clear Mappings. You can click on **Clear Mappings** to create the new mappings.

7) Now, a barcode will be generated for all the query records and you will be navigated to an item viewer, as shown below. Here, you can navigate to different PaperSave Areas, Generate another Barcode, view a list of the query records, print the barcodes, and save/clear mappings.

The screenshot displays the PaperSave application interface. The top navigation bar includes options like 'PaperSave', 'Print coversheet from Query', 'revenue max', 'Generate Barcodes', 'View Query Records', 'Print Item', and 'Save Mappings'. The main content area shows a document viewer with a barcode and the following information:

**PAPER SAVE**  
Efficiency Simplified

Document ID# 24756  
Related Record Type: Blackbaud Enterprise CRM - HVTEST51HA.BBCRM99982t - Blackbaud Enterprise CRM - Revenue  
Document Type: Revenue Documentation  
Printed By: niprajapati@papersavecloud.com  
Date Created: 2022-03-23

Company: HVTEST51HA.BBCRM99982t	
Blackbaud Enterprise CRM-Transactions - Revenue - Record Information	
Revenue ID	\$900.00
Constituent ID	412b9e46-77fd-4d1f-82ab-a06ba6f93333
Transaction Amount	0
Transaction Date	9999-01-01

Query Information :	
ID	2b6f1f59-4c03-4ec2-ad52-944f737567ed
Name	Geoffrey T. Beckner
Date	7/30/2003
Currency	6abebc7e-fedc-473d-abe8-503807c94e0e
Key Name	Beckner
First Name	Geoffrey
Middle Name	Todd
Constituent ID	ce8b3821-c2d9-44a5-95df-b69e792adda1

Document Type: Revenue Documentation Profile Fields	
Order Date	03/25/2022

8) Now, click on **Print Item** and select any of the following Print options as per your requirement.

- **Print:** This option will print the coversheet currently displayed in an item viewer.
- **Print Selected:** This option will print the coversheets that you have selected using the checkbox in an unsubmitted item list
- **Print All Across All Document Types:** This option will print all the coversheets generated for all the document type (available in Generate Barcodes options)

9) Once you select the relevant print option, a print dialog box appears, as shown below. Click on **Print** to proceed with printing the coversheet or click on **Cancel** to exit the dialog box without performing print operation.




Document ID# 24756  
 Related Record Type: Blackbaud Enterprise CRM - HVTEST51HA BBCRM99982t - Blackbaud Enterprise CRM - Revenue  
 Document Type: Revenue Documentation  
 Printed By: niprajapati@papersavecloud.com  
 Date Created: 2022-03-23

Company: HVTEST51HA BBCRM99982t	
Blackbaud Enterprise CRM-Transactions - Revenue - Record Information:	
Revenue ID	\$900.00
Constituent ID	d12b9e46-77fd-4d1f-82ab-a06ba6f93333
Transaction Amount	0
Transaction Date	9999-01-01

Query Information :	
ID	2b6f1f59-fc03-4ec2-ad32-9d4f737567ed
Name	Geoffrey T. Beckner
Date	7/30/2003
Currency	6abe6c7e-fedc-473d-abe8-505807c94e0e
Key Name	Beckner
First Name	Geoffrey
Middle Name	Todd
Constituent ID	ce8b3821-c2d9-44a3-95df-b69c792adda1

Document Type: Revenue Documentation Profile Fields:	
Order Date	03/25/2022

Print 1 sheet of paper

Destination HP507E41 (HF) ▾

Pages All ▾

Copies 1

Layout Portrait ▾

Color Color ▾

More settings ▾

Print
Cancel

10) After the print operation is performed, a confirmation message will be prompted as shown below. If you click on **Yes**, then it will remove the printed barcode coversheets from the unsubmitted item list and on **No**, it will keep the coversheets in unsubmitted item list so that you can print again (in case print operation failed).

PaperSave | Print coversheet from Query | revenue max | Generate Barcodes | View Query Records | Print Item | Save Mappings

Related Revenue | Constituent ID | Constituent Name | Transaction Type | Transaction Amount | Payment Method | Transaction Date | Transaction Description | Batch Number | Refresh




Document ID# 24756  
 Related Record Type: Blackbaud Enterprise CRM - HVTEST51HA BBCRM99982t - Blackbaud Enterprise CRM- Revenue  
 Document Type: Revenue Documentation  
 Printed By: nuprajapati@papersavecloud.com  
 Date Created: 2022-03

Company: HVTEST51  
 Blackbaud Enterprise CRM  
 Revenue ID  
 Constituent ID  
 Transaction Amount  
 Transaction Date

Query Information :

ID	2b4f1f59-6c03-4ec2-ad32-944c737567ed
Name	Geoffrey T. Beckner
Date	7/30/2003
Currency	fab6e67e-fdc4-473d-abe8-505807c9460e
Key Name	Beckner
First Name	Geoffrey
Middle Name	Todd
Constituent ID	ce8b3821-c2d9-44a5-95df-b69c792adda1

Document Type: Revenue Documentation Profile Fields:

Order Date	03/25/2022
------------	------------

**Print successfully?**

Please confirm that all the coversheets were printed successfully. Clicking on Yes will delete the selected coversheets from PaperSave and clicking on No will leave the selected coversheets in unsubmitted item list.

1 | Revenue - ID - Revenue Doc... | [Navigation icons]

# Batch integration plug-in for Blackbaud CRM

Batch integration plug-in enhances the experience of a user who desires to PaperSave 7 within the Revenue batches in Blackbaud CRM. In order to enable PaperSave functionalities in Revenue batch, it is required to install this plug-in.

Here, you can define different keyboard shortcuts to perform add/show documents operations in the Blackbaud CRM Revenue batch.

This section contains the following topics:

- [Configuring Batch integration plug-in from Google Chrome](#)
- [Steps to add PaperSaveID to batch template](#)

**Note:** This plug-in is supported only for the Chrome browser.

# Configuring Batch integration plug-in from Google Chrome

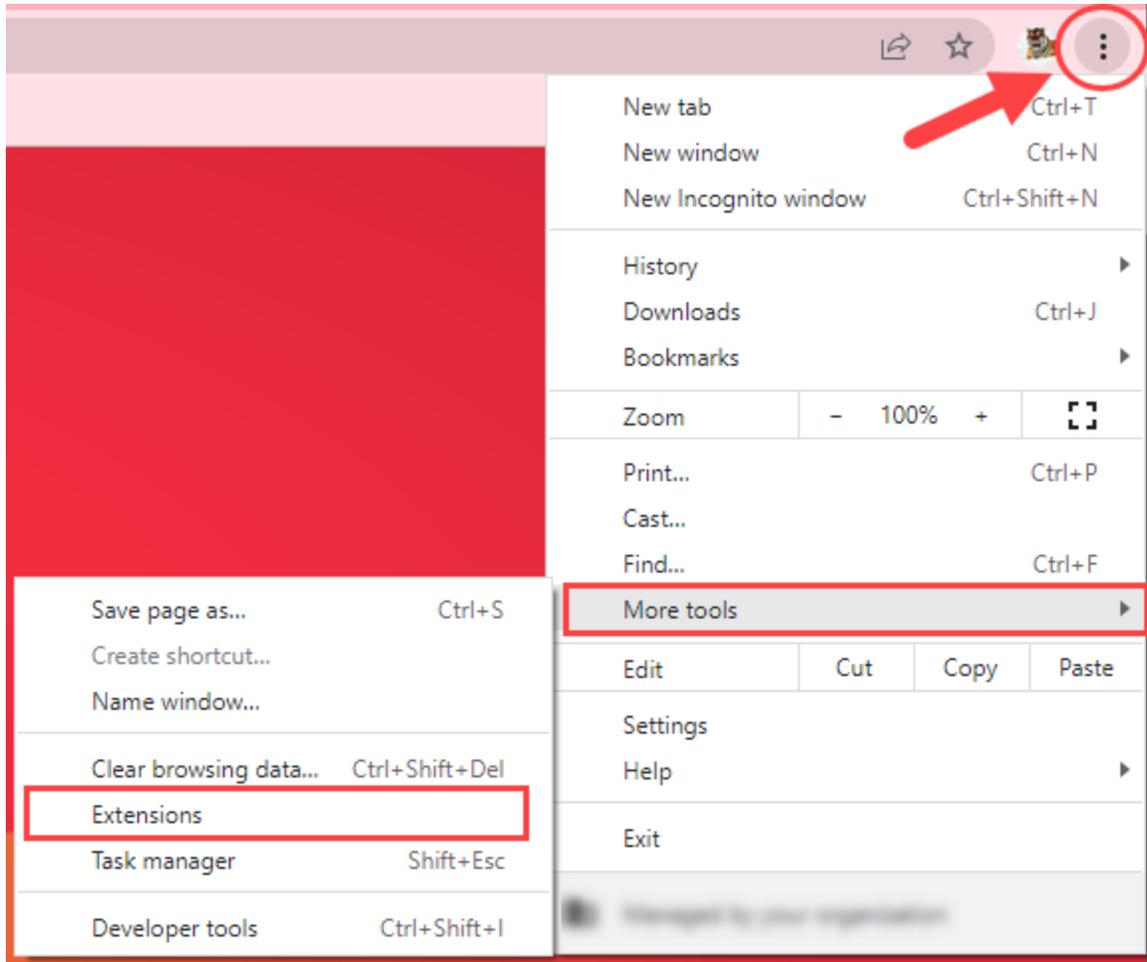
Follow the below steps to install PaperSave Batch Integration Plug-in:

1) Open Chrome web store and search for "PaperSave 7 Batch integration" or Enter the URL given by Paper-Save Team to install Chrome Plugin:

**Sample URL:** <https://chrome.google.com/webstore/detail/papersave7-batch-integration/ekaeipfbpbielnioffpapkflfmflj>

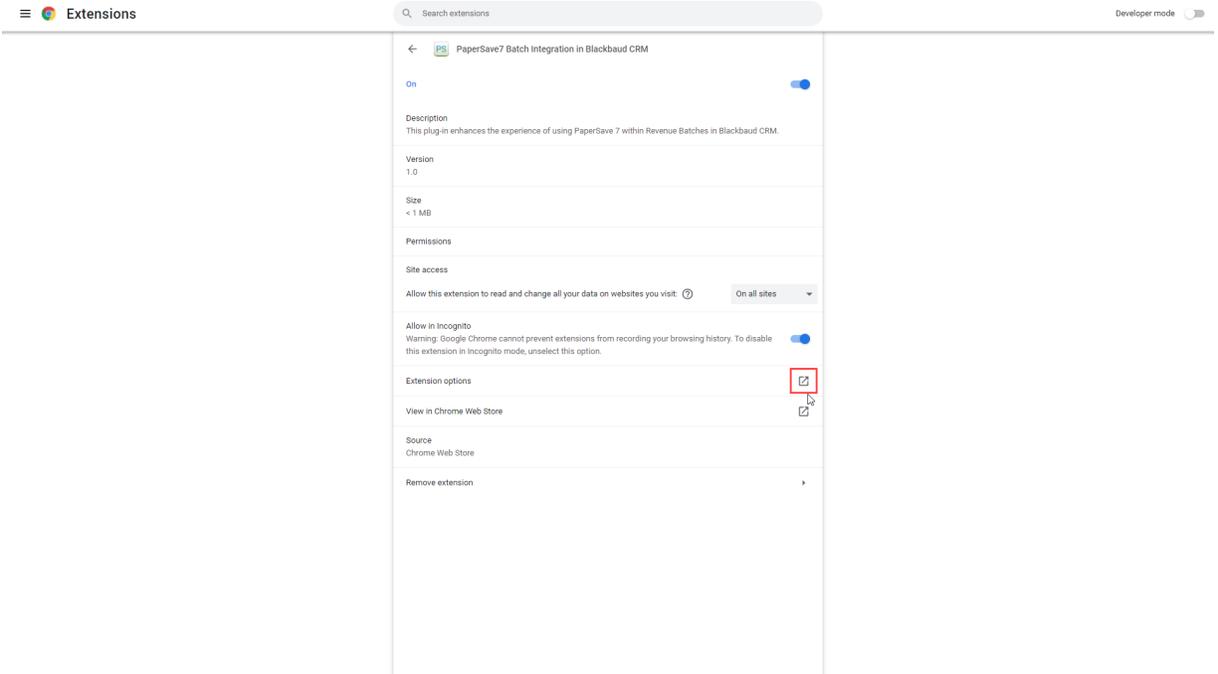
2) Now, click on Add to Chrome and wait till it gets installed successfully.

3) Once installed, Click on Ellipse icon > More Tools > Extensions.



4) Now, enable PaperSave 7 Batch Integration Plug-in and click on **Details** button as shown below





**PS** PaperSave7 Batch Integration in Blackbaud CRM ✕

PaperSave API Root URL\* :

Company Name:

Add Document Shortcut :  +

Show Document Shortcut :  +

*\*Please make sure your shortcut doesn't conflict with other default shortcuts.*

Disable Plugin for Current Session :

**Note:** Please make sure your shortcut does not conflict with other default (browser or windows) shortcuts.

6) Enter **PaperSave API Root URL** (for example, 12345t.app.papersave.com). Company Name field is optional. Hence, you can enter the value if you remember the exact name else skip this field and click on **Save** button.

 PaperSave7 Batch Integration in Blackbaud CRM✕

PaperSave API Root URL\* :

Company Name:

Add Document Shortcut :

+

Show Document Shortcut :

+

\*Please make sure your shortcut doesn't conflict with other default shortcuts.

Disable Plugin for Current Session :

**Tip:** When you perform any PaperSave operation in Revenue batch and only one company is configured, then that single company name will automatically get mapped in the Company Name field of the batch integration dialog box. Now, in case you have multiple companies, a dialog box appears as shown below where you can select your desired company from the drop-down and save it, and then it is automatically mapped with the batch integration extension.



## PaperSave 7 Batch Integration Configuration

The company entered (if entered) isn't a valid company

CRM Database:

HV	82t	▼
HV	982t	
hv	ty	

**Note:** This feature will work with only one Company at a time.

**Example:** If two companies are registered as **Company A** and **Company B** and if the plugin is installed for **Company A**, it will work with **Company A** only. If you have logged in with Company B, the plugin will not work.

7) Now, when you open Blackbaud CRM in browser, it validates BBCRM URL and then checks for PaperSave Root URL and if you have not set PaperSave root URL yet, it gives prompt message as shown below for setting PaperSave Root URL

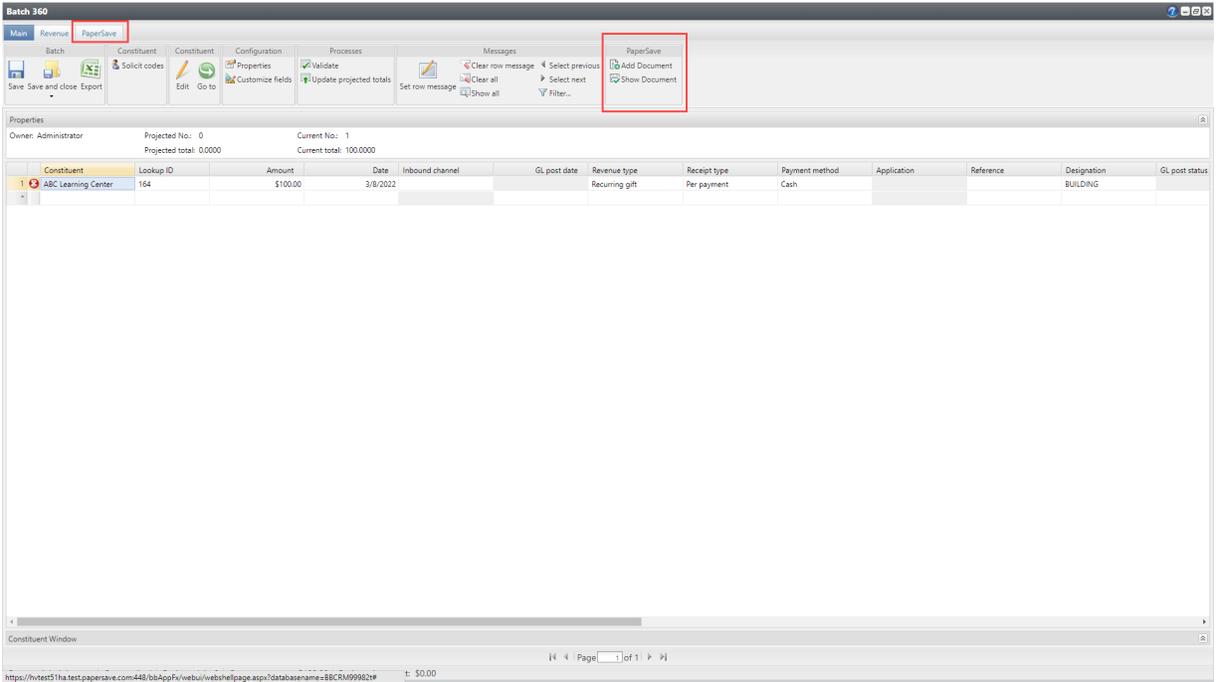
hvttest51ha.test.papersave.com:448 says

Please set URL to your PaperSave system from the options section of the plugin. Click on the 'Ok' button and we will redirect you to the Plug-in Options page, If you don't know the URL or want to skip setting it at this time then select the 'Disable PaperSave for Current Session' option.

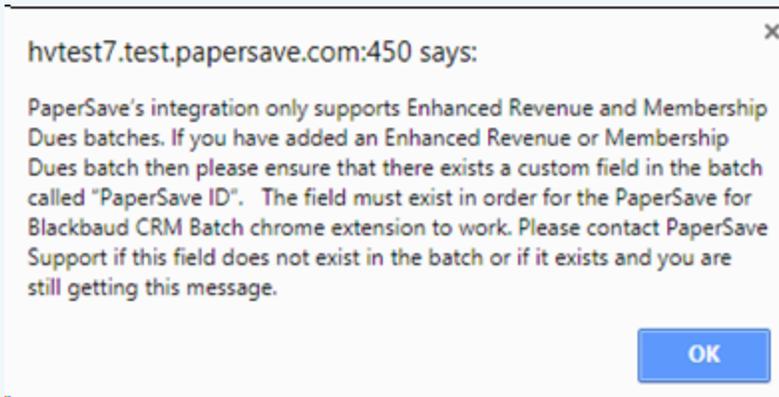


- If you click **OK** it redirects you to batch integration dialog box and if you don't want to define or don't know the Root URL, then you can define disable PaperSave for session by using **Disable PaperSave for Current Session** option and it gets disabled for current session.

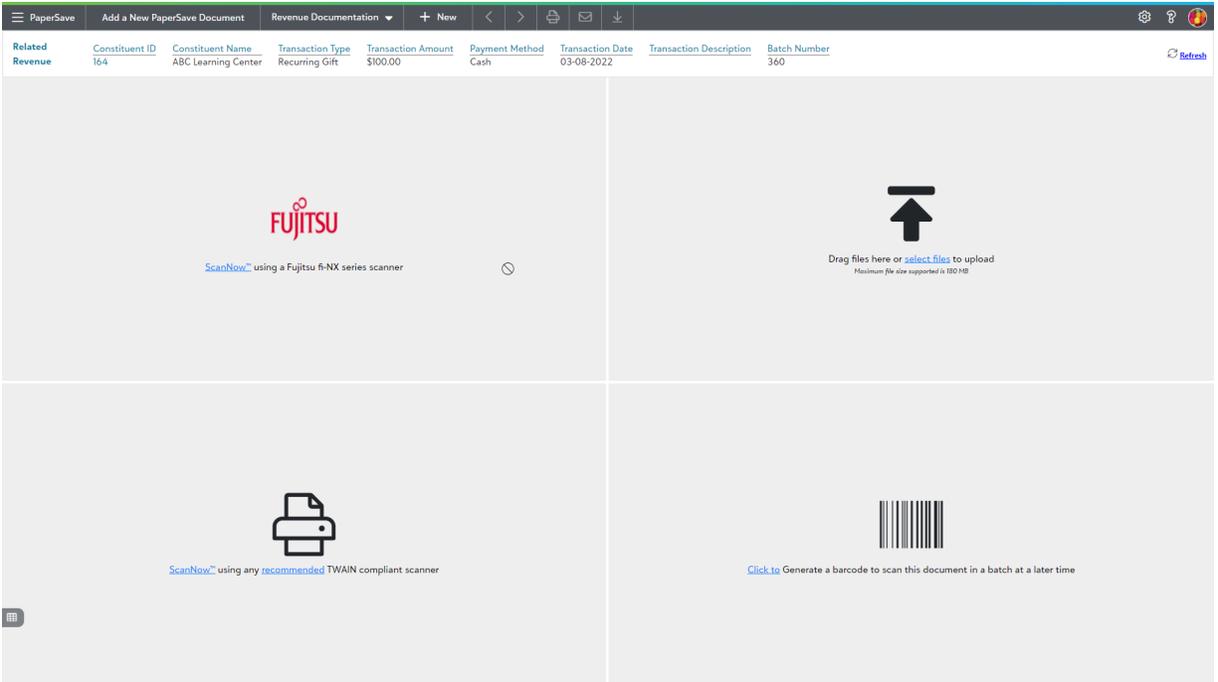
8) When PaperSave Batch Integration Plugin gets installed successfully, PaperSave options are displayed as the add-in buttons in Home tab of Revenue Batch and a separate **PaperSave** tab is also added to the batch as shown below.



**Note:** While clicking on **Add Document** button, a prompt may appear as below showing that 'Paper-SaveID' field needs to be added to Batch Template. Click [here](#) to know more about it.



9) Now, click on **Add Document** button or Press **Alt+A** or your customized shortcut to add the documents and it will open **Add A New PaperSave Document** window as shown below:



- And click on **Show Document** button or Press **Alt+S** or your customized shortcut to view the added documents and it will open PaperSave's **Document Display** window as shown below:

PaperSave Document Display + Add more pages

Related Revenue	Constituent ID	Constituent Name	Transaction Type	Transaction Amount	Payment Method	Transaction Date	Transaction Description	Batch Number
	164	ABC Learning Center	Recurring Gift	\$100.00	Cash	03-08-2022		360

ID: 24584  
Batch: smoke test 8march

Field Actions: Select Field Actions Go

Order Date :  
Enter Value

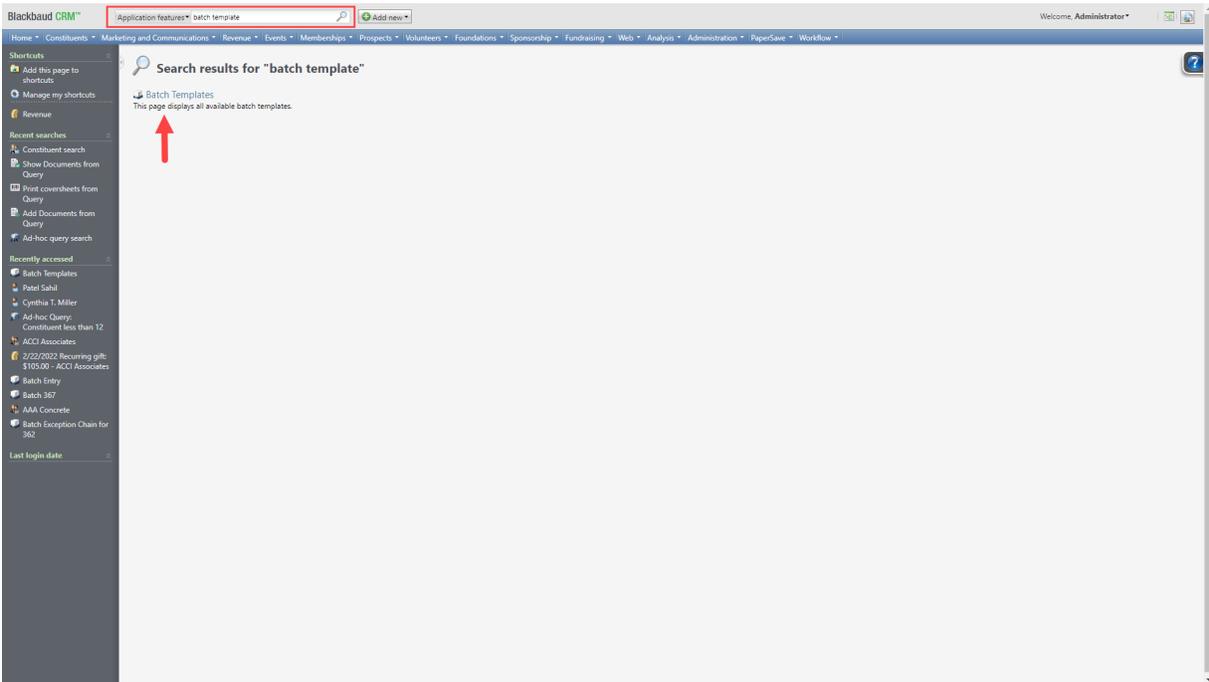
Customer No :  
Enter Value

3 / 3 L\_Page\_W-9 IRS.cdf

# Steps to add PaperSaveID to batch template

Follow the below steps to add PaperSaveID to batch template:

1) Open Blackbaud CRM application and search for keyword "Batch Template" in the search box as shown below and select **Batch Templates** option.



2) Now, Search for batch templates for **Enhanced Revenue Batch** and **Membership Dues Batch**. Now, select one of the template and click on **Edit** button. Let's say Enhanced Revenue Batch as shown below.

Blackbaud CRM™ Application features: template Add new

Welcome Administrator

Home \* Constituents \* Marketing and Communications \* Revenue \* Events \* Memberships \* Prospects \* Volunteers \* Foundations \* Sponsorship \* Fundraising \* Web \* Analysis \* Administration \* PaperSave \* Workflow

Tasks Batch entry

Configuration Batch numbering schemes Batch workflows

Shortcuts Add this page to shortcuts Manage my shortcuts Revenue Recent searches Constituent search Show Documents from Query Print coversheets from Query Add Documents from Query Ad-hoc query search Recently accessed Batch Templates Patel Sahil Cynthia T. Miller Ad-hoc Query: Constituent less than 12 ACCI Associates 2/22/2022 Recurring gift: \$105,000 - ACCI Associates Batch Entry Batch 367 AAA Concrete Batch Exception Chain for 362 Last login date

### Batch Templates

Batch templates (35) Add Filters More

Name	Workflow	Numbering scheme	Category	Import only	Active	Site
Address Validation Batch	Address Validation Batch	Address Validation Batch	Constituent		✓	
AddressFinder Batch	Change of Address Update Batch	Change of Address Update Batch	Address		✓	
Auction Item Batch	Auction Item Batch	Auction Item Batch	Auction		✓	
BBIS Donation Transaction Batch	BBIS Donation Transaction Batch	BBIS Donation Transaction Batch	Blackbaud Internet Solutions		✓	
BBIS Event Registration Transaction Batch	BBIS Event Registration Transaction Batch	BBIS Event Registration Transaction Batch	Blackbaud Internet Solutions		✓	
BBIS Membership Transaction Batch	BBIS Membership Transaction Batch	BBIS Membership Transaction Batch	Blackbaud Internet Solutions		✓	
BBIS Profile Update Transaction Batch	BBIS Profile Update Transaction Batch	BBIS Profile Update Transaction Batch	Blackbaud Internet Solutions		✓	
BBIS Signup Transaction Batch	BBIS Signup Transaction Batch	BBIS Signup Transaction Batch	Blackbaud Internet Solutions		✓	
Constituent Batch	Constituent Batch	Constituent Batch	Constituent		✓	
Constituent Batch Basic	Constituent Batch Basic	Constituent Batch Basic	Constituent		✓	
Constituent Update Batch	Constituent Update Batch	Constituent Update Batch	Constituent		✓	
DeceasedRecordfinder Batch	Deceased Finder Batch	Deceased Finder Batch	Constituent		✓	
Direct Marketing Effort Batch	Direct Marketing Effort Batch	Direct Marketing Effort Batch	Marketing Effort		✓	
Educational History Update Batch	Educational History Update Batch	Educational History Update Batch	Educational History		✓	
EmailFinder Batch	Email Finder Batch	Email Finder Batch	Email Address		✓	
Enhanced Revenue Batch	Enhanced Revenue Batch	Enhanced Revenue Batch	Revenue		✓	

Edit Copy Create import Mark inactive Delete

Batch type: Enhanced Revenue Batch

Description: Default Enhanced Revenue Batch

Enhanced Revenue Custom Batch	Enhanced Revenue Batch	Enhanced Revenue Batch	Revenue	✓
Event Batch Basic	Event Batch Basic	Event Batch Basic	Event	✓
Event Registrant Batch Basic	Event Registrant Batch Basic	Event Registrant Batch	Registrant	✓
Exchange Calendar Item Batch	Exchange Calendar Item Batch	Exchange Calendar Item Batch	Exchange Integration	✓
Exchange Contact Update Batch	Exchange Contact Update Batch	Exchange Contact Update Batch	Exchange Integration	✓
Exchange Email Batch	Exchange Email Batch	Exchange Email Batch	Exchange Integration	✓
Fundraising Purpose Financial Inf...	Fundraising Purpose Financial Inf...	Fundraising Purpose Financial Inf...	Fundraising Purpose Financial Info	✓
Giving Summary Update Batch	Giving Summary Update Batch	Giving Summary Update Batch	Prospect Research Giving Summary	✓
Memberships Due Batch	Membership Due Batch	Membership Due Batch	Membership	✓
Model Scores and Ratings Batch	Model Scores and Ratings Batch	Model Scores and Ratings Batch	Model Scores and Ratings	✓
Model Scores and Ratings Update...	Model Scores and Ratings Update...	Model Scores and Ratings Update...	Model Scores and Ratings	✓
PeopleFinder Batch	People Finder Batch	People Finder Batch	Constituent Address	✓
PhoneFinder Batch	Phone Finder Batch	Phone Finder Batch	Phone	✓
Pledge Write-off Batch	Pledge Write-off Batch	Pledge Write-off Batch	Revenue	✓

1 2

https://rvttest51ha.text.paperstave.com:443/ibbAppFu/webui/webshell/page.aspx?databaseName=BBCRM999823#

3) Navigate to **Select fields and defaults** as shown in below screen.

**Edit batch template** [X]

Let's get started **Select fields and defaults** ✓ Configure options ✓ Set permissions ✓ Confirm and save ✓

To get started, enter some basic information about the batch template.

**General information**

Batch template name: Enhanced Revenue Batch

Description: Default Enhanced Revenue Batch

Workflow name: Enhanced Revenue Batch

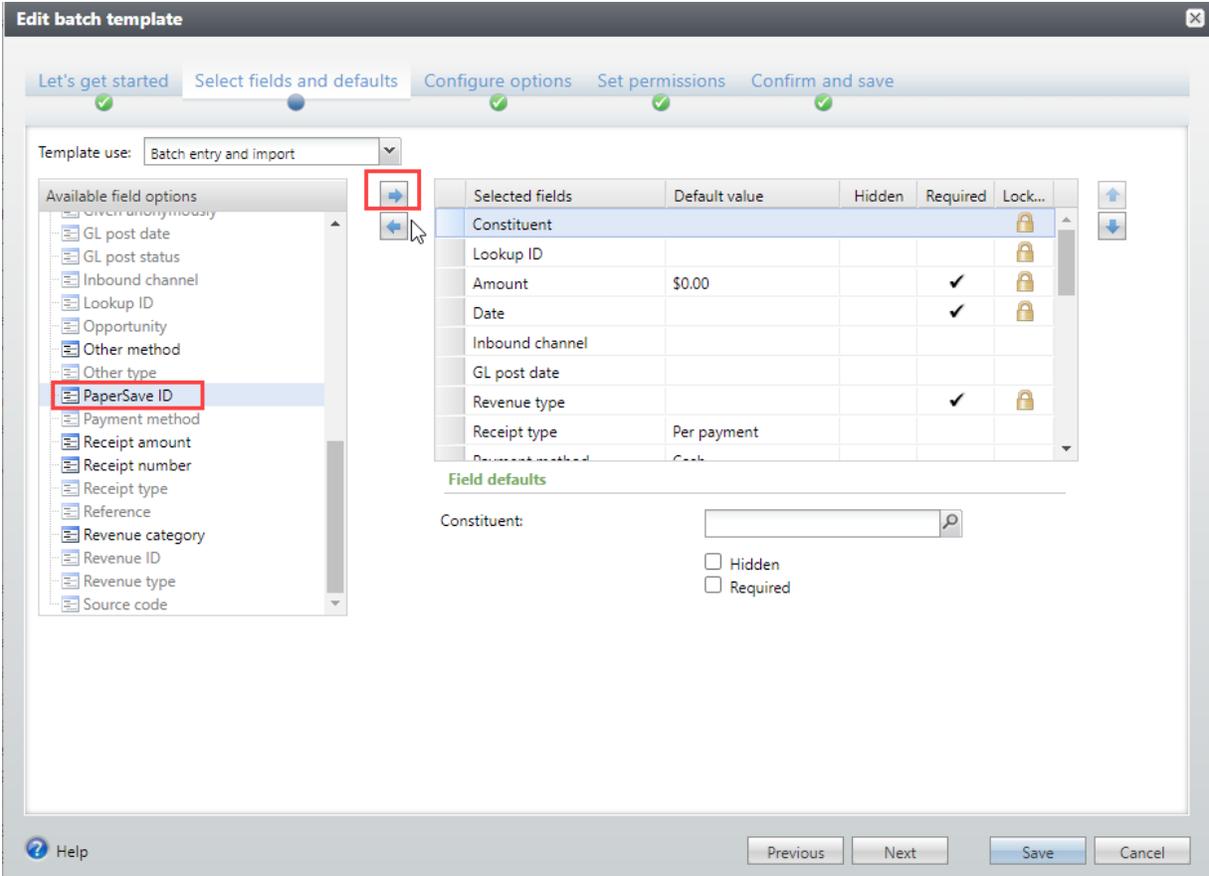
Numbering scheme: Enhanced Revenue Batch

Enable auto-save

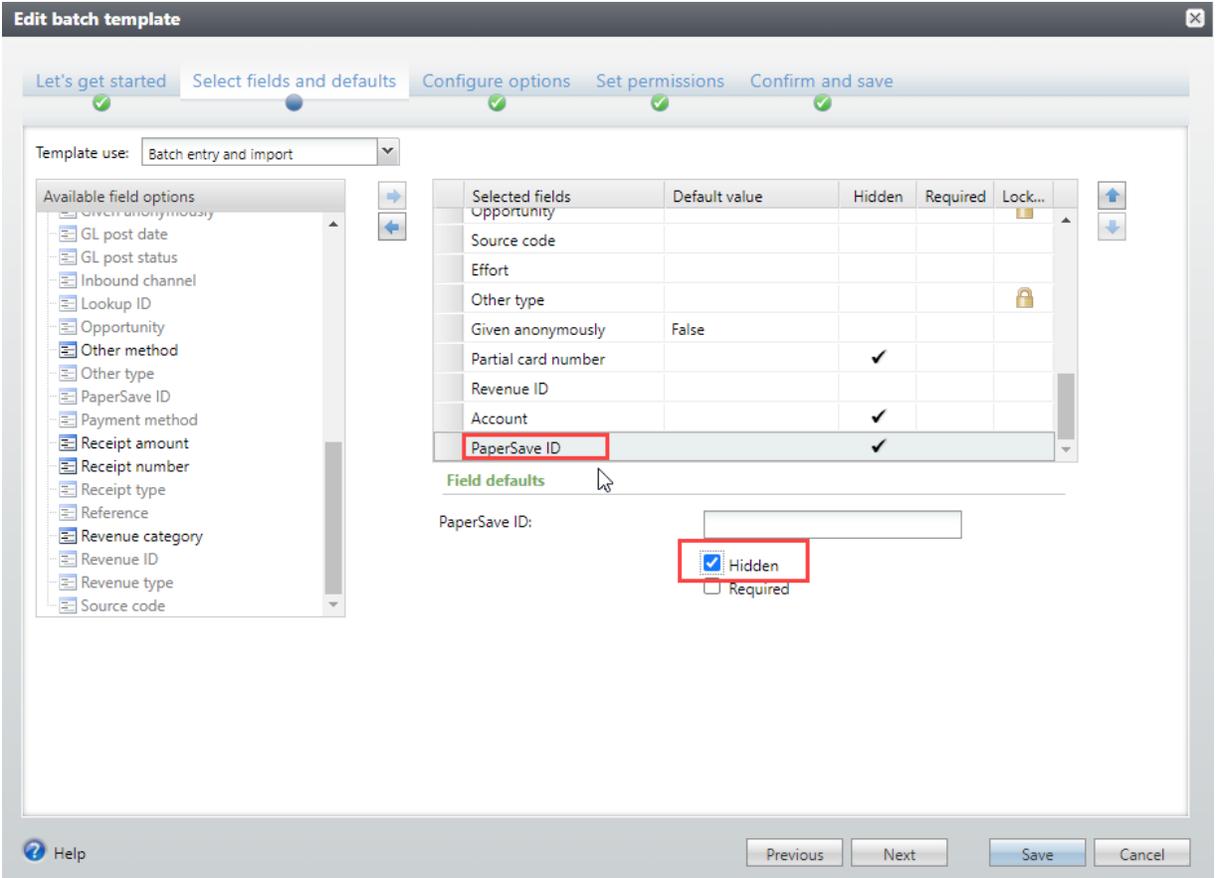
Site: All sites

Help Previous Next Save Cancel

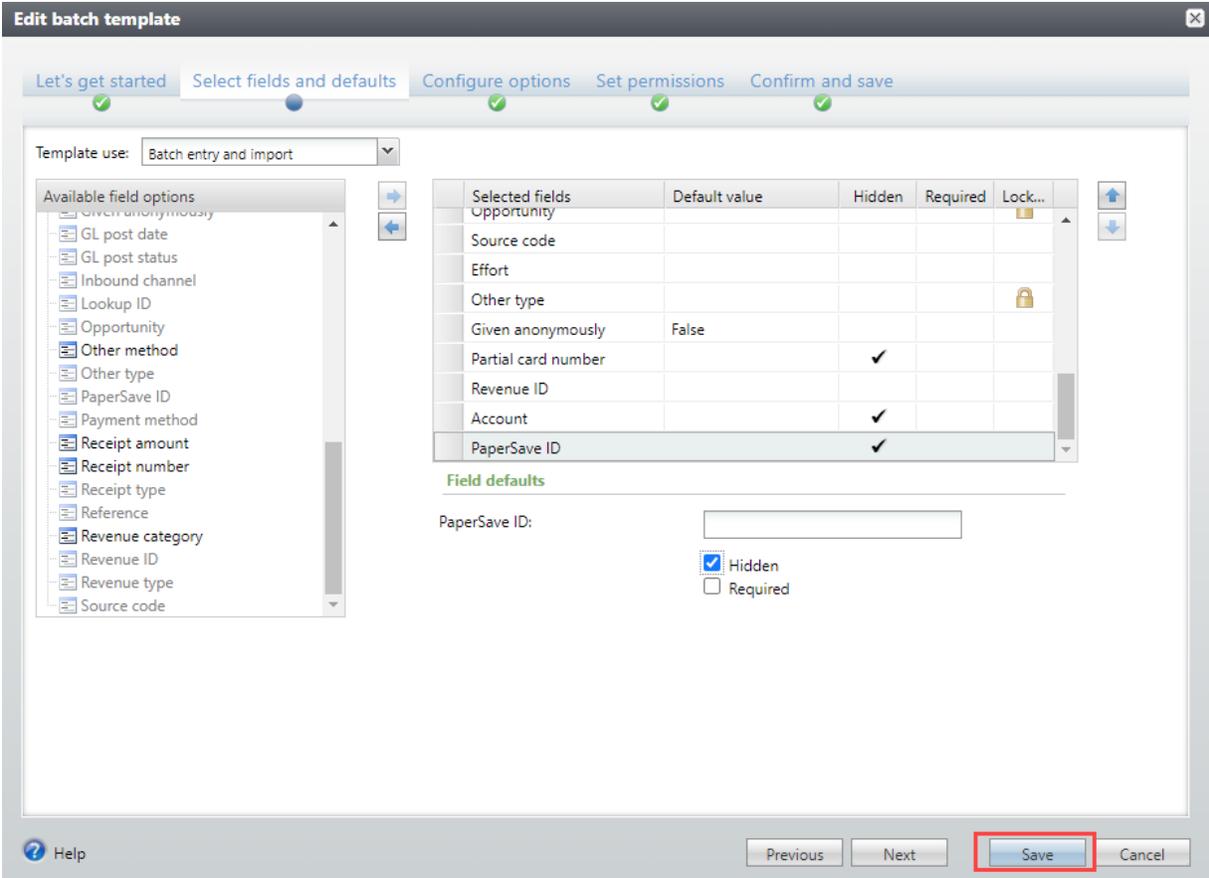
4) Locate **PaperSave ID** field in Available field options and add that field to batch template.



5) Once you add the PaperSave ID to the template, select that field from the list and tick mark it as Hidden.



6) Now, click on **Save** button.



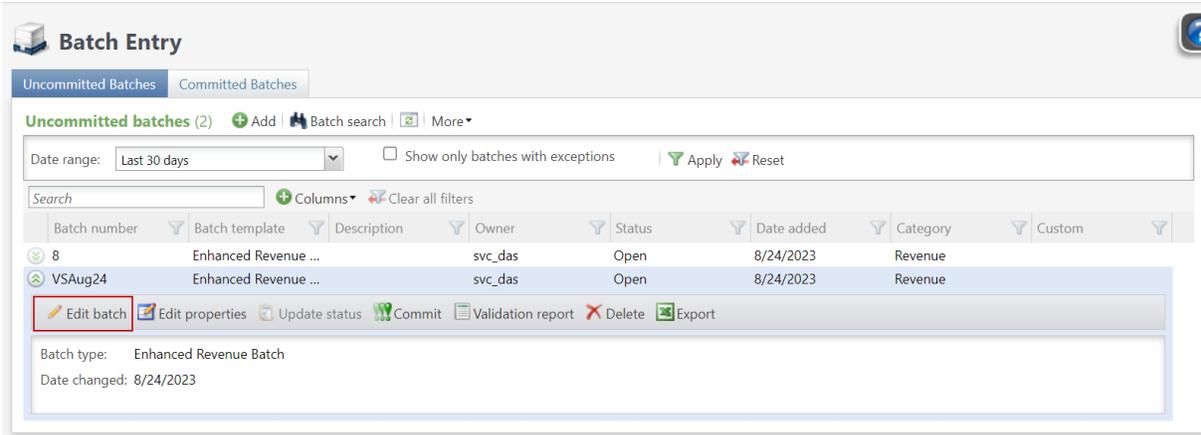
**Note:** Repeat from steps 2 to 6 for all the batch templates of Enhanced revenue and Membership dues batches used by PaperSave users.

## Add/Show Documents from Revenue batch

After configuring and enabling PaperSave batch integration plug in as per the steps give in this section, Paper-Save add/show documents options appears.

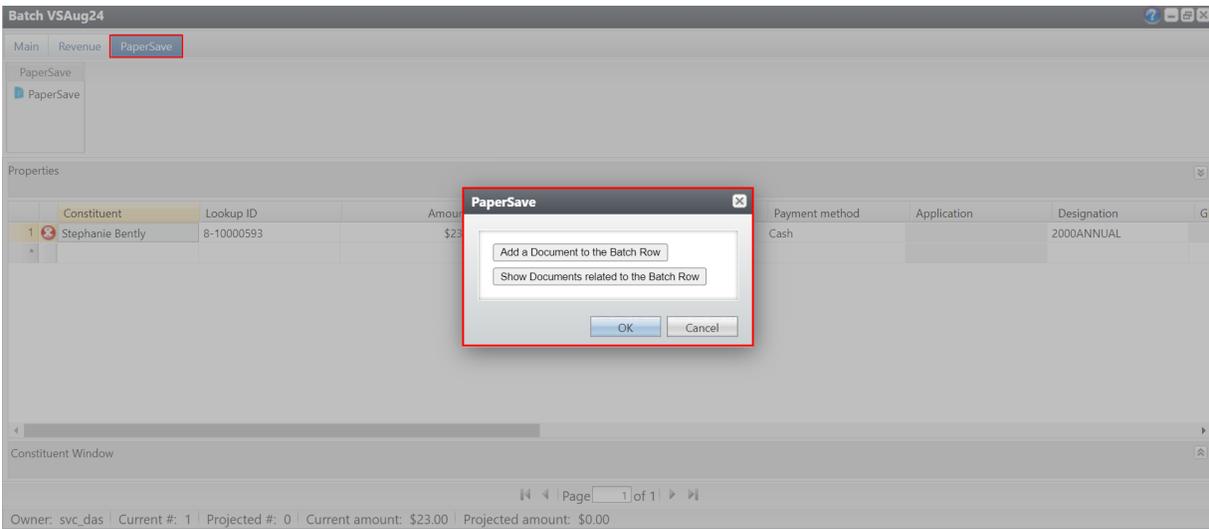
To access PaperSave options within Revenue Batch:

1) Go to the specific uncommitted Revenue Batch to which you want to add a document. Let's say you want to add a new document to VSAug24, then open that batch, and click on the **Edit Batch**.



2) Batch screen appears. Now, on this screen, you can either add/show documents from the Main tab or the PaperSave tab. Let's add/show the document using the PaperSave tab.

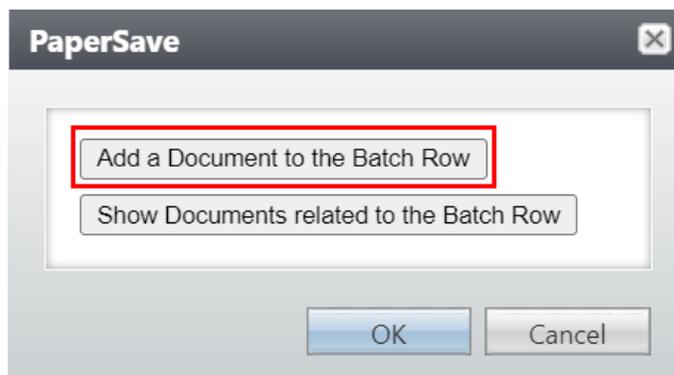
3) On the Batch screen, click on the PaperSave tab and then PaperSave menu. A dialog box appears from where you can perform the operations such as "Add document to the Batch row" and "Show documents related to the Batch row". You can either click on any of the options or press the shortcut keys to perform the necessary operation.



## Adding Document to the Batch Row

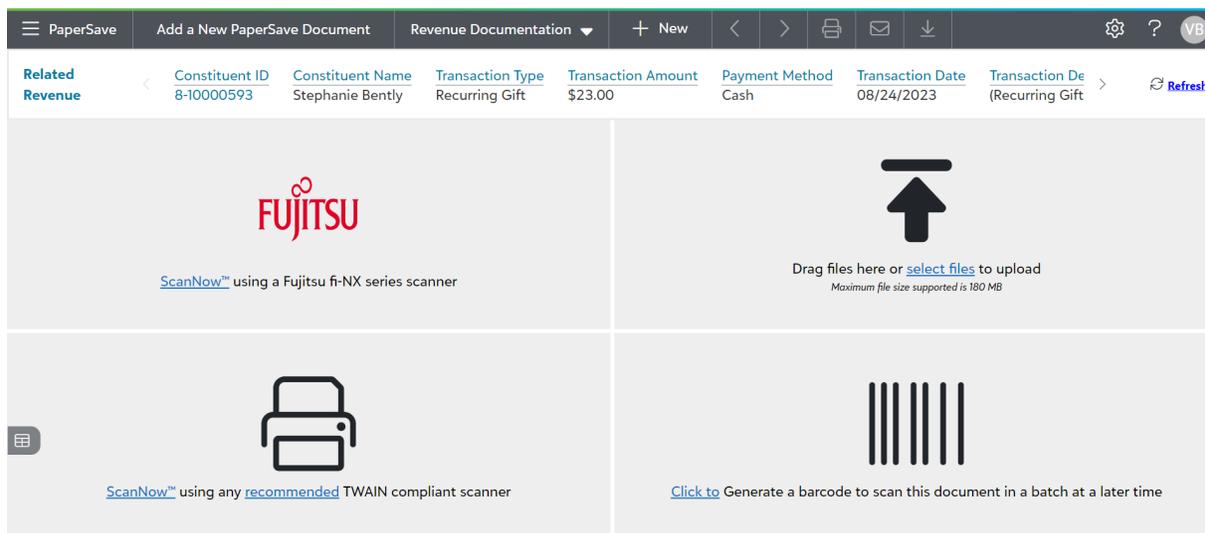
To add a document related to the batch row:

- 1) Click on the **Add a Document** to the Batch Row option.



- 2) You are redirected to the [File capture options panel](#), as shown in the below screen from where you can add a new document using any of the following four options.

**Note:** When you are trying to add documents from any record, record type or PaperSave shortcuts, then also you may get the following options.



Scan/Upload documents using any of the [supported Acquisition methods](#).

- [Validating the document in the document viewer](#).

- [Saving the document to the BBCRM records.](#)

In addition to adding documents directly from BBCRM, you can also add documents from:

- [Workflow Area](#)
- [Acquire Area](#)
- [Browse Area](#)

## File Capture options panel

PaperSave provides various options for acquiring the documents. You can select any of the following file capture options to add documents to your record in PaperSave:

- [ScanNow using TWAIN compliant scanner](#)
- [ScanNow using Fujitsu fi-NX series scanner](#)
- [Drag files or Select the files to upload](#)
- [Click to generate a barcode to scan the document in a batch at a later time](#)

The screenshot displays the PaperSave interface for adding a document. At the top, there is a navigation bar with the following elements: a hamburger menu icon, 'PaperSave', 'Add a New PaperSave Document', 'Revenue Documentation' (with a dropdown arrow), '+ New', and navigation icons (back, forward, print, mail, download). On the right side of the navigation bar are settings, help, and user profile icons (a gear, a question mark, and 'VB').

Below the navigation bar is a data table with the following columns and values:

Related Revenue	Constituent ID	Constituent Name	Transaction Type	Transaction Amount	Payment Method	Transaction Date	Transaction De	
	8-10000593	Stephanie Bently	Recurring Gift	\$23.00	Cash	08/24/2023	(Recurring Gift)	<a href="#">Refresh</a>

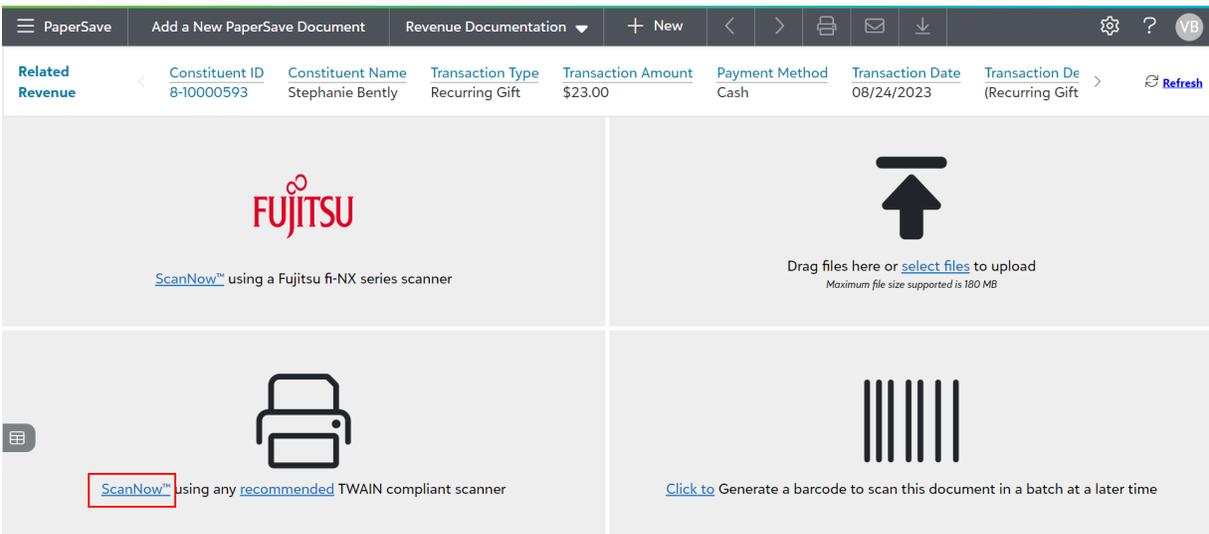
The main content area is divided into four quadrants, each representing a different file capture option:

- Top Left:** Features the Fujitsu logo and the text 'ScanNow™ using a Fujitsu fi-NX series scanner'.
- Top Right:** Features an upward-pointing arrow icon and the text 'Drag files here or [select files](#) to upload' with a sub-note 'Maximum file size supported is 180 MB'.
- Bottom Left:** Features a printer icon and the text 'ScanNow™ using any [recommended](#) TWAIN compliant scanner'.
- Bottom Right:** Features a barcode icon and the text 'Click to [Generate a barcode](#) to scan this document in a batch at a later time'.

## ScanNow using TWAIN scanner

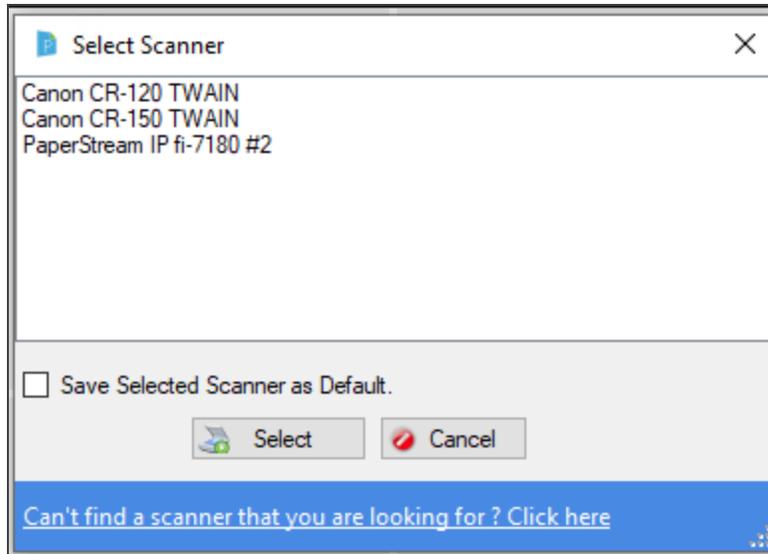
Watch the video to learn how to add documents for an Integrated app record using a TWAIN scanner.

1) Click on the "ScanNow™ using any TWAIN compliant scanner" option in the file capture options panel to add a document from a TWAIN compliant scanner as shown below:



2) You shall be prompted to pick a scanner from the available list of scanners upon clicking "ScanNow™" using recommended TWAIN compliant scanner".

**compliant scanner.**



3) You can define your favorite scanner as default so that you do not have to choose it again next time.

**Note:** It may occur that you have installed drivers of a particular scanner, but are not connected to the scanner. In such cases, the scanner might be displayed in the list as it detects the installed drivers and shows the same in the list.

**Tip:** The app will prompt you to download and install the PaperSave Windows Client upon scanning for the first time. You must download it as per the given instructions to scan documents using the TWAIN scanner.

**Note:** The scanning utility and the TWAIN scanning only works on Windows operating system, Whereas Scanning on a Mac can only be accomplished with the Fujitsu fi-NX series scanner option.

The ideal configuration for PaperSave supported TWAIN Compliant Scanner is as shown below:

**For Output Type:** PDF

<b>16 GB RAM</b>			
<b>Page Side</b>	<b>DPI</b>	<b>Scan Type</b>	<b>Total Pages</b>
<b>Single</b>	200&300	Black & White/Color/Gray	Upto 600
<b>Duplex</b>	200&300	Black & White/Gray	Upto 600
	200	Color	Upto 200
	300	Color	Upto 40

<b>8 GB RAM</b>			
<b>Page Side</b>	<b>DPI</b>	<b>Scan Type</b>	<b>Total Pages</b>
<b>Single</b>	200&300	Black & White/Color/Gray	Upto 600
<b>Duplex</b>	200&300	Black & White	Upto 600
	200	Color	Upto 200
	300	Color	Upto 40
	200	Gray	Upto 400
	300	Gray	Upto 120

**For Output Type: TIFF**

<b>16 GB RAM</b>			
<b>Page Side</b>	<b>DPI</b>	<b>Scan Type</b>	<b>Total Pages</b>
<b>Single</b>	200&300	Black & White/Color/Gray	Upto 600
<b>Duplex</b>	200&300	Black & White/Color/Gray	Upto 600

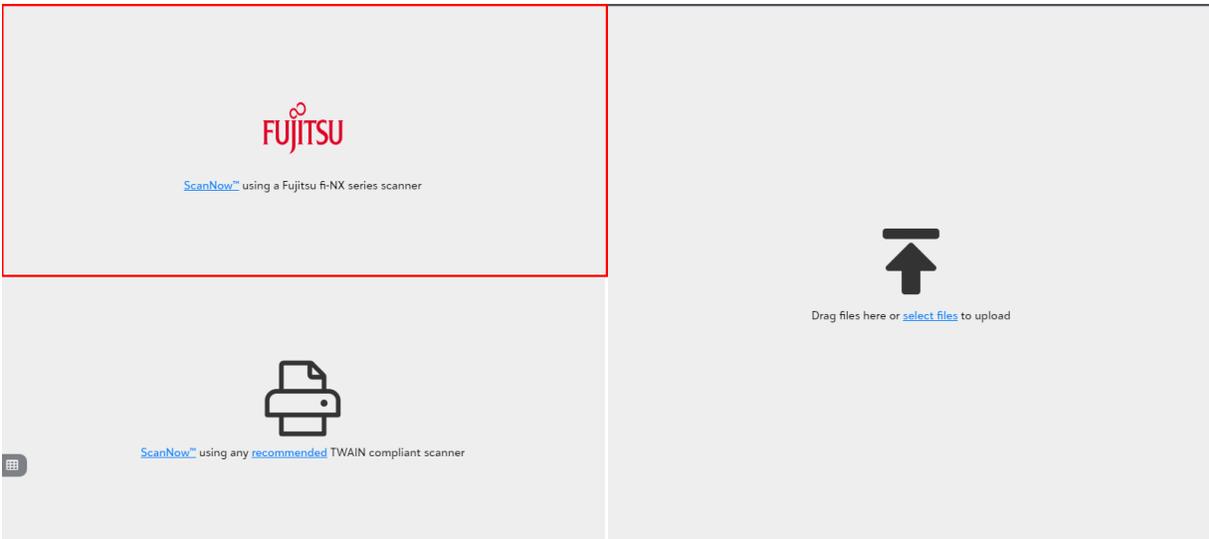
<b>8 GB RAM</b>			
-----------------	--	--	--

Page Side	DPI	Scan Type	Total Pages
Single	200&300	Black & White/Color/Gray	Upto 600
Duplex	200&300	Black & White/Color/Gray	Upto 600

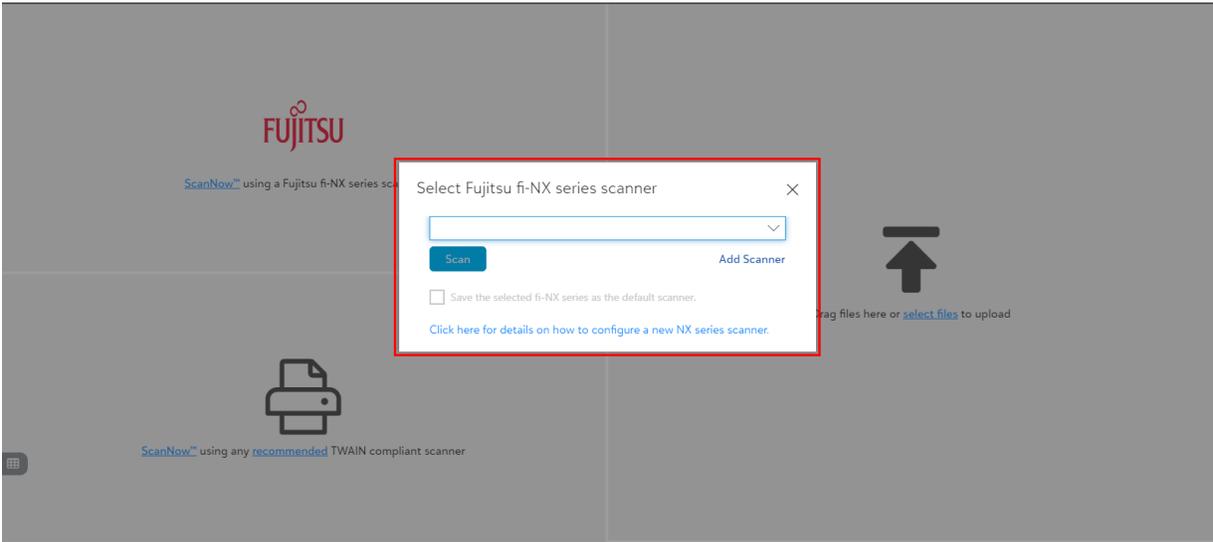
**Note:** Once you acquire the item, you can validate and submit the unsubmitted document to the Workflow. Click [here](#) to learn in detail about validating and submitting the documents.

### Scan using Fujitsu fi-NX series scanner

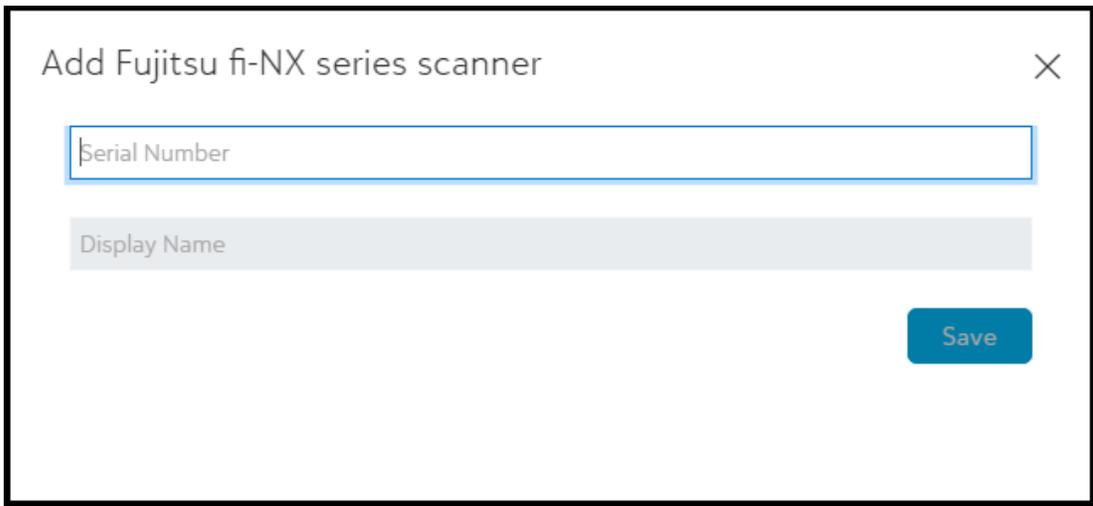
- 1) Watch the video to learn how to add documents for an integrated app record using a Fujitsu fi-NX series scanner.
- 2) Click on the "ScanNow™ using Fujitsu fi-NX series scanner" in the file capture options panel to add a document from a Fujitsu fi-NX series scanner as shown below.
- 3) You will be prompted to pick a scanner from the available list of scanners upon clicking "ScanNow™ using Fujitsu fi-NX scanner". Select a scanner from the available list of scanners to proceed with scanning the document as shown below:



4) You will be prompted to pick a scanner from the available list of scanners upon clicking "**Scan Now using Fujitsu fi-NX scanner**". Select a scanner from the available list of scanners to proceed scanning as shown below:



5) Click on "**Add Scanner**" to add a new Fujitsu fi-NX series scanner to the scanner list by entering required details.



**Tip:** See the instructions to configure new Fujitsu fi-NX series scanner by clicking on the link "[click here for details on how to configure a new NX series scanner](#)" at the bottom part of the select Fujitsu scanner dialog.

**Note:** Once you acquire the item, you can validate and submit the unsubmitted document to the Workflow. Click [here](#) to learn in detail about validating and submitting the documents.

6) Click on "Add Scanner" to add a new Fujitsu fi-NX series scanner to the scanner list by entering the required details as shown below. Click on Save to add the scanner to the existing list.

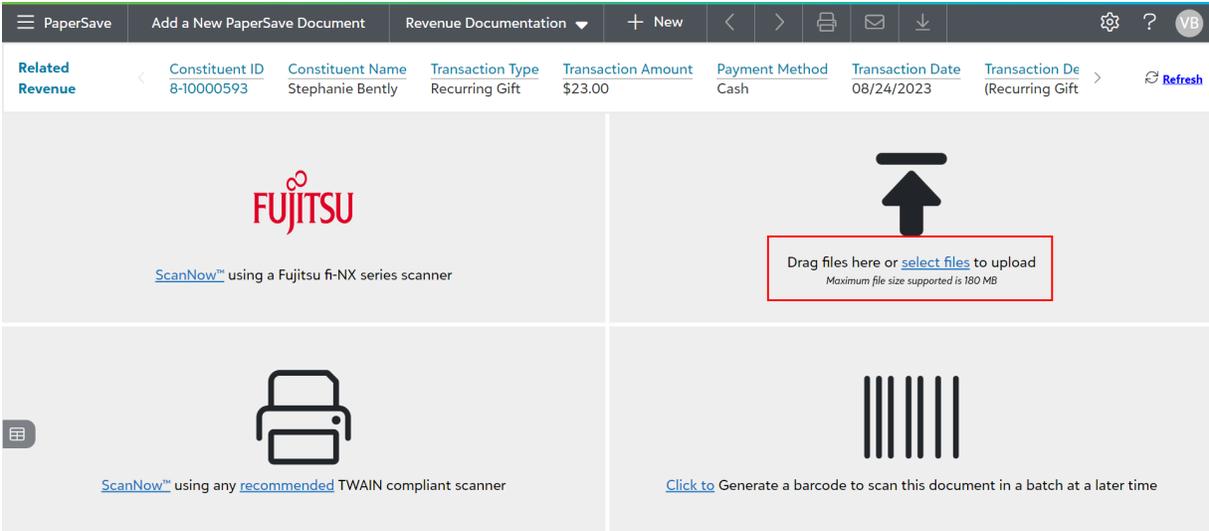
**Note:** Once you acquire the document, you can validate and save the document in the integrated app record. Learn in detail about validating and saving the documents.

## Drag files or select files to upload

Watch the video to learn how to add a document for an Integrated app record by dragging files or uploading from your file explorer.

PaperSave provides you with two options to acquire by uploading electronic documentation:

- Drag one or more documents from your file browser to drag files in the file capture options panel.
- Click on "select files" (from within the Drag files tile) to select one or more documents through your file browser as shown below.



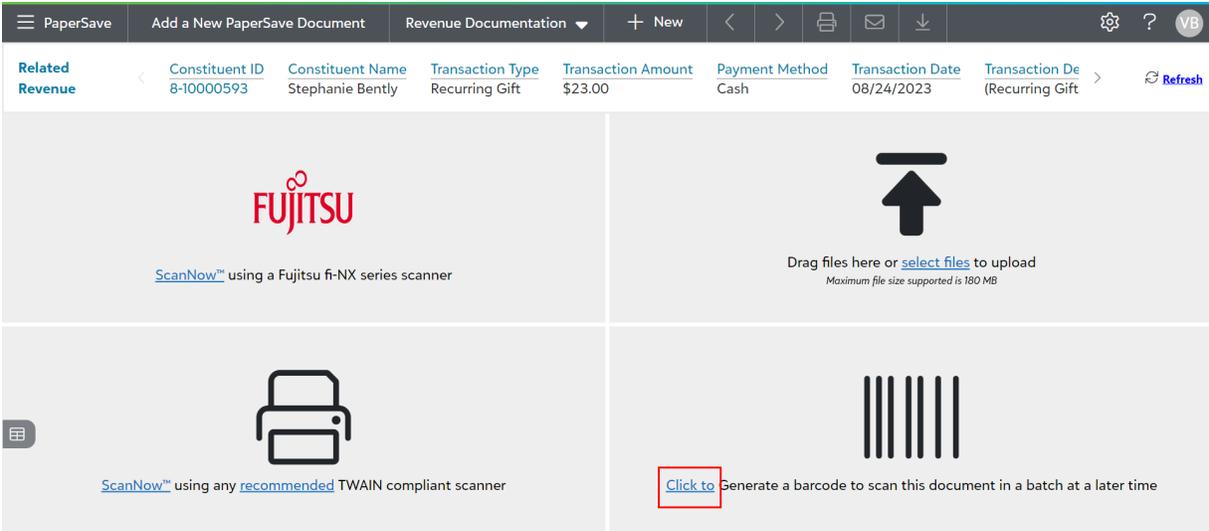
**Note: Note:** Once you acquire the document, you can validate and save the document in the integrated app record. Learn in detail about validating and saving the documents.

### Click to generate a barcode to scan later

In the file capture option panel, you get an option to generate a barcode using which you scan the documents in a batch at a later time.

Watch the video to learn how to generate a barcode coversheet.

1) Click on the "Click to" option to generate a barcode as shown below:

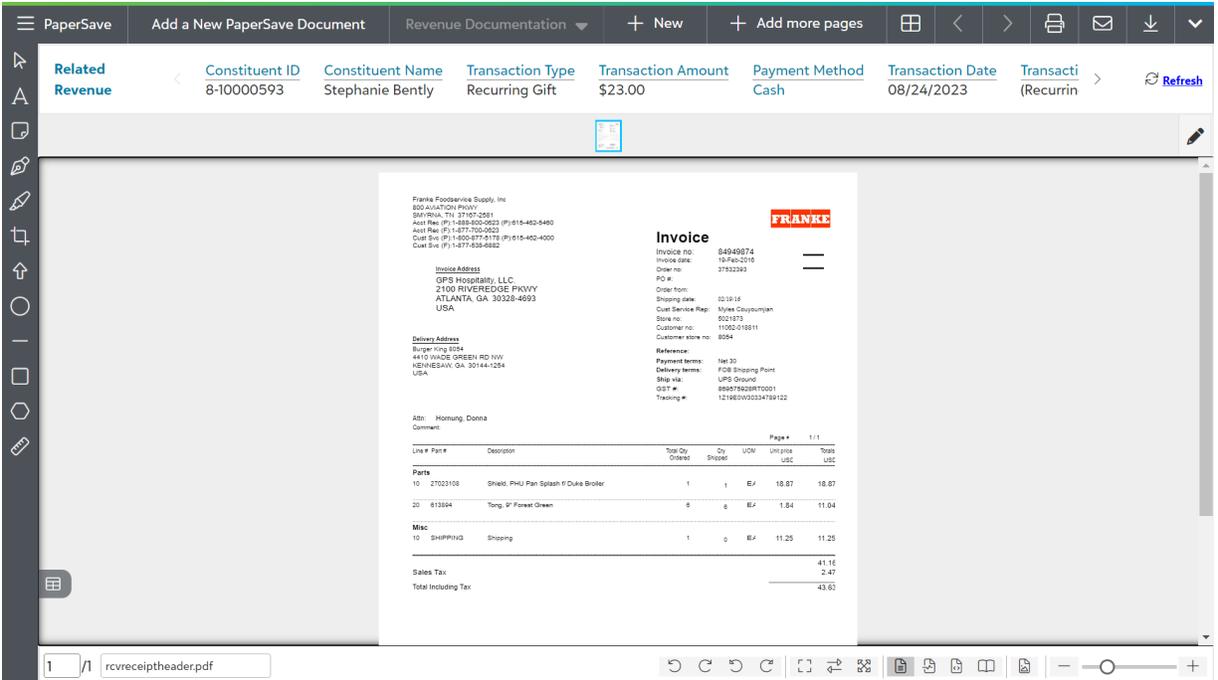


The document created with a barcode will be available in the unsubmitted documents. You can use the document with the generated barcode as the separator to scan the documents in a batch at a later time.

**Note:** Once you acquire the document, you can validate and save the document in the integrated app record. Learn in detail about validating and saving the documents.

### Validating the document in the document viewer

All unsubmitted documents are displayed in the Item List. After the documents are acquired successfully, all such documents open automatically in the document viewer. You can perform various operations on the document, such as editing fields, adding annotations, and saving one or more documents in the document viewer.



Watch the video to learn more about Validating Profile fields.

Explore the various topics for preparing and validating the unsubmitted documents from the below list:

Top-level toolbar options for unsubmitted documents

Watch the video to learn the various top-level toolbar options in the Unsubmitted document viewer.

## Page manipulation view for unsubmitted documents

Watch the video to learn about the Page Manipulation View. Click here to learn in detail about Page Manipulation View.

Note: Page manipulation view option will remain disabled if you add files with mime types other than Tiff and PDF.

## Setting Panel in the unsubmitted document viewer

Watch the video to learn about the Settings Panel for the document viewer (unsubmitted items).

## Using Image annotation options for unsubmitted documents

Watch the video to learn how to use annotations on the document in the document viewer. [Click here](#) to learn in detail about all Image Annotation options.

**Note:** Note: Image Annotation options panel will not appear for the files with the office (.doc, .docx, .xls, .xlsx, .ppt, .pptx) and email (.msg and .eml) extensions.

**Tip:** Tip: Once you validate the unsubmitted item, you are ready to save that item in the record. [Click here](#) to learn in detail about saving the documents to the Blackbaud CRM record.

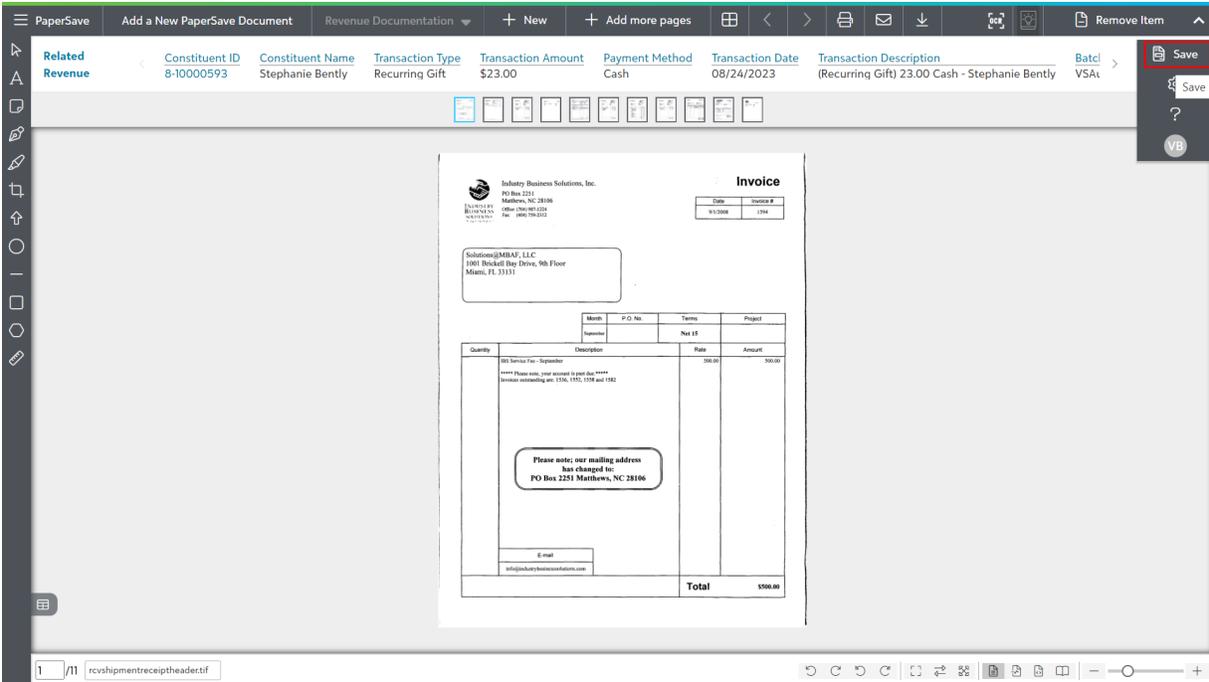
## Saving the document to add to Blackbaud CRM record

Once you validate the profile fields, you can save the acquired document to add it to Blackbaud CRM record.

Watch the video to learn how to save an acquired document.

To save the document:

- 1) Go to the unsubmitted item list and select the document to save by clicking on the checkbox.
- 2) Click on the Save option in the top-level toolbar of the item viewer as shown below.



3) You will see a toast notification in the top-right corner of the screen showing the submission success. Similarly, it will display a failure notification in case of a submission failure.

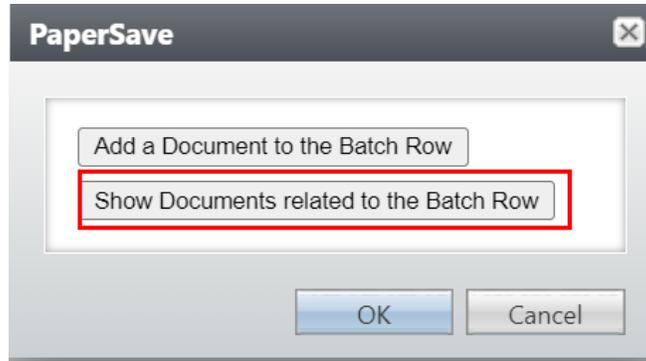


4) You can view the newly added document from the PaperSave options in the Blackbaud CRM record.

### Showing Documents related to the Batch Row

To show a document related to the batch row:

- 1) Click on the **Show Documents related to the Batch Row** option.



2) Now, you are redirected to the related document of the revenue batch window in the browser, as shown in the below screen.

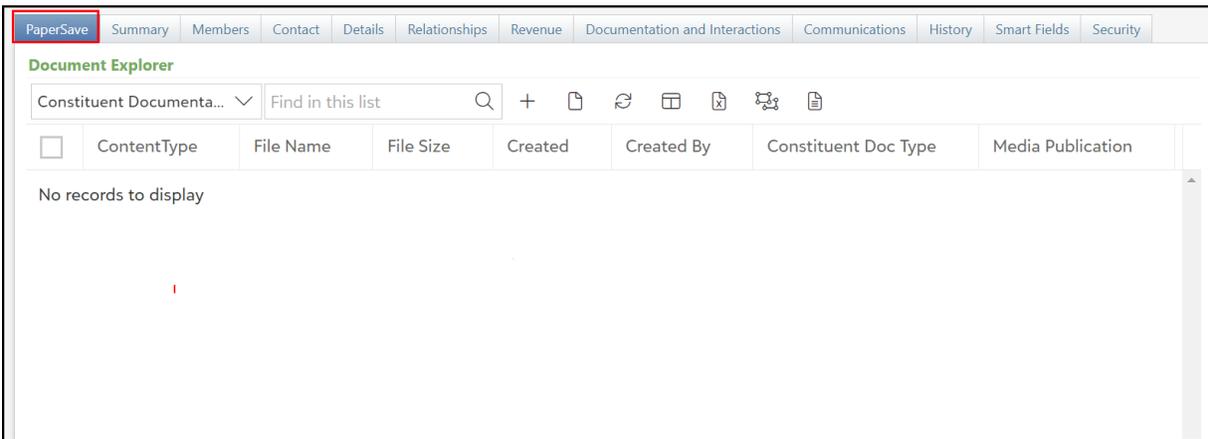
The screenshot shows a web browser interface. The top navigation bar includes 'PaperSave', 'Document Display', and '+ Add more pages'. Below this is a breadcrumb trail: 'Related Revenue' > 'Constituent ID 8-10000593' > 'Constituent Name Stephanie Bently' > 'Transaction Type Recurring Gift' > 'Transaction Amount \$23.00' > 'Payment Met Cash'. A 'Refresh' button is on the right. On the far right, a sidebar shows 'ID: 1195562', 'Batch: VSAug24', and 'Field Actions: Select Field Actions'. The main content area displays a PDF invoice from 'WHITE OWL Business. Process. Delivered.'. The invoice is titled 'INVOICE 2' and is dated 12/23/2014. It lists 'White Owl Solutions' as the sender and 'John Doe' as the recipient. A table at the bottom of the invoice shows a single line item for 'Consulting services' with a quantity of 5, a unit price of 200, and a total of 1000. A large red 'SAMPLE' watermark is overlaid on the invoice. The browser's address bar shows '1 / 1 Sample Invoice.pdf' and the page number '64' is visible in the bottom right corner.

# Accessing PaperSave options within Blackbaud CRM

After configuring and enabling PaperSave batch integration plug in as per the steps give in this section, Paper-Save add/show documents options appears

PaperSave allows you to perform various operations on documents within Blackbaud CRM. You may access the list toolbar options to perform all the following operations:

**Note:** Note: This option will remain enabled only when a current user has the right to add the document within the selected document type. These rights could be managed from the Document types in the Configuration Area.



**Note: Note:** Only the delegated users can add, view, edit and delete the documents.

The following are the topics covered in this section:

- [Add a new document to Blackbaud CRM](#)
- [Open document in PaperSave Options](#)
- [Choose Fields in PaperSave Options](#)

- [Export to Excel in PaperSave Options](#)
- [View Interrelated documents from PaperSave Options](#)
- [Show Document List within PaperSave Options](#)
- [Slide up Toolbar options in PaperSave Options](#)

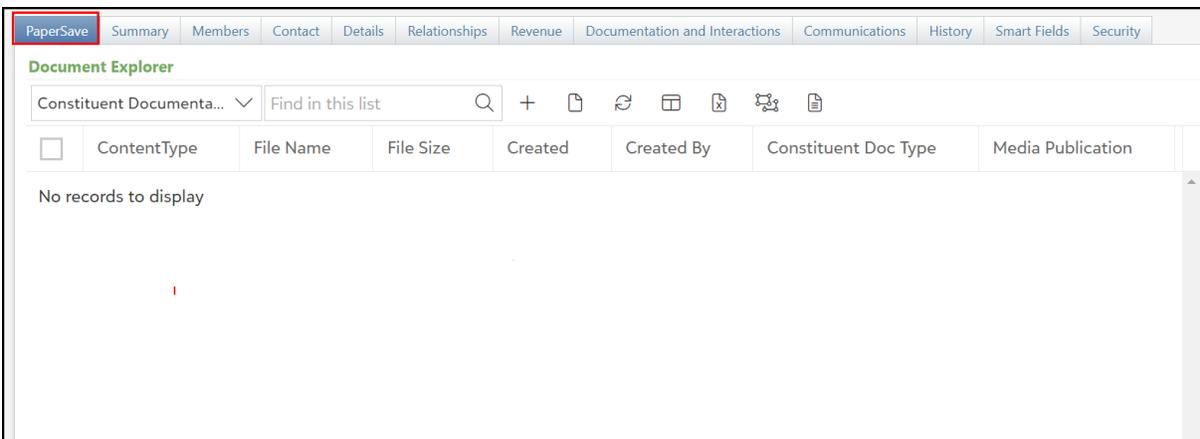
## Add a new document to Blackbaud CRM

You can add documents to Blackbaud CRM records through PaperSave using various file capture options such as scanning the documents by using a TWAIN compliant scanner or Fujitsu fi-NX series scanner, uploading files from your file explorer, or generate a barcode to scan the documents in a batch later.

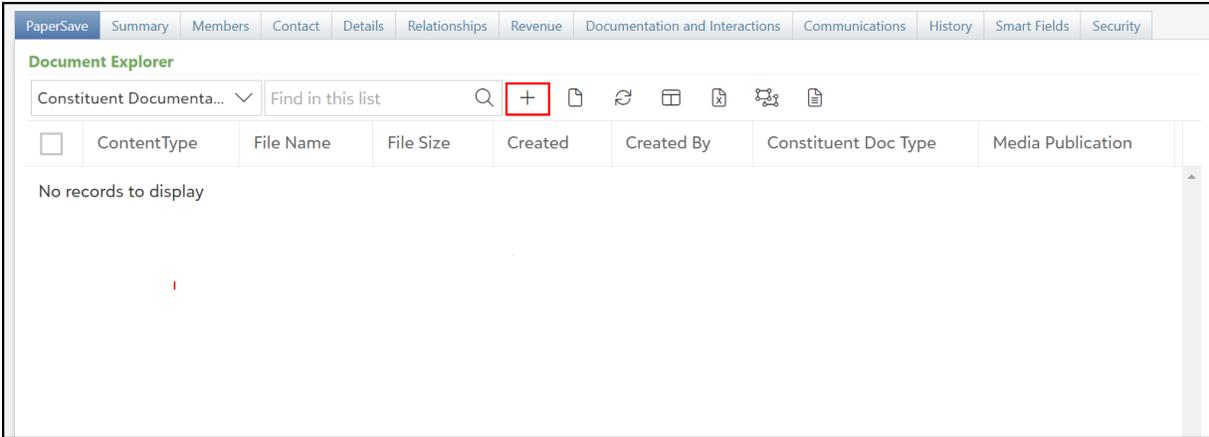
**Tip:** Tip: Open Blackbaud CRMRecord to view or access PaperSave options, refer to Accessing PaperSave Options in Blackbaud CRM.

Follow the below steps to add a new document to Blackbaud CRM record:

1) Go to the specific record type to which you want to add a document. Let's say if you want to add a new document to the constituent type, then go to that constituent, and click on the PaperSave tab.

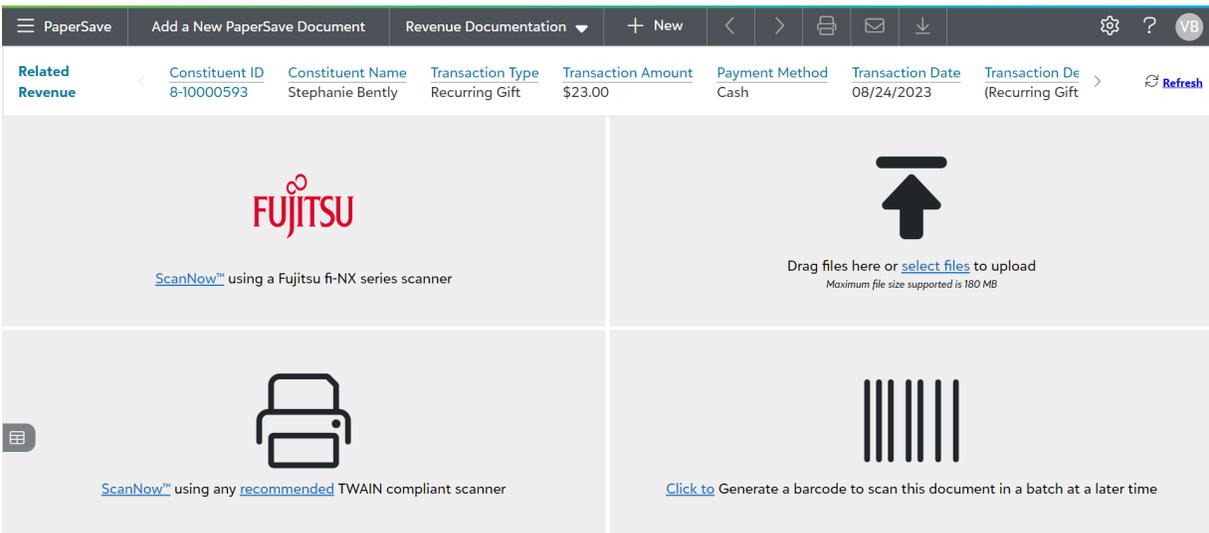


2) Minified Document Explorer opens. Click **New** to add a new document.



3) This will redirect you to the PaperSave application (as configured in Platform Services of Blackbaud CRM) from where you can add a new document using any of the following four options:

- ScanNow using a Fujitsu fi-NX series scanner.
- Drag or select files to upload.
- ScanNow using TWAIN compliant scanner.
- Generate a barcode to scan the document later.



The following are the topics related to adding a new document to BBCRM record:

Scan/Upload documents using any of the supported Acquisition methods.

- Validating the document in the document viewer.
- Saving the document to the BBCRM records.

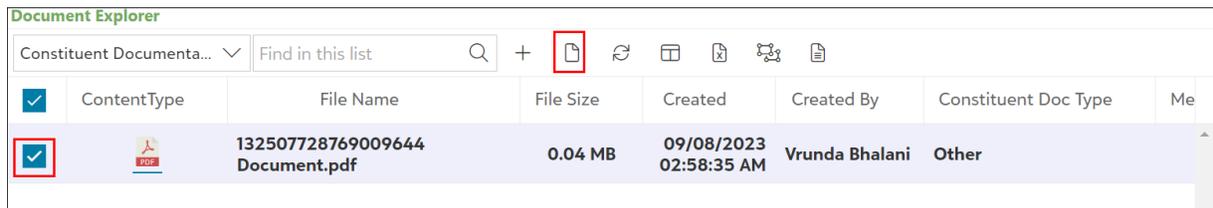
In addition to adding documents directly from BBCRM, you can also add documents from:

- Workflow Area
- Browse Area

## Open document from PaperSave options

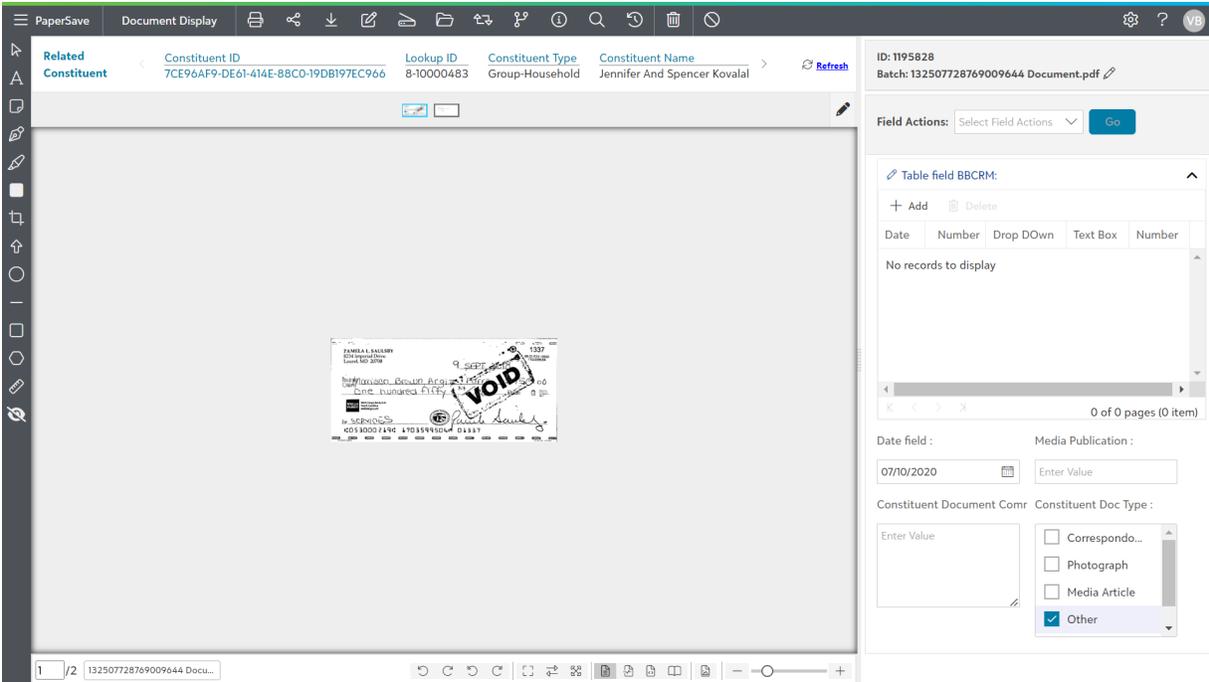
After adding the documents using PaperSave, open the documents by following the below steps:

1) Select a document from the list and click on **Open**.



Document Explorer										
Constituent Documenta... ▾		Find in this list 🔍		+						
<input checked="" type="checkbox"/>	ContentType	File Name	File Size	Created	Created By	Constituent Doc Type	Me			
<input checked="" type="checkbox"/>		132507728769009644 Document.pdf	0.04 MB	09/08/2023 02:58:35 AM	Vrunda Bhalani	Other				

2) This will redirect you to PaperSave Document Display screen, where you can view the selected document and validate the document, if required.

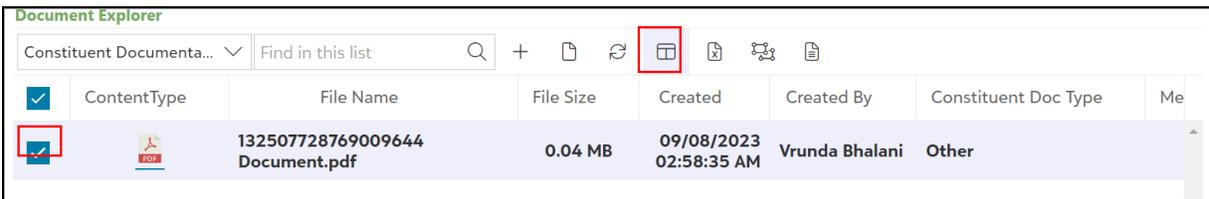


## Choose Fields from PaperSave options

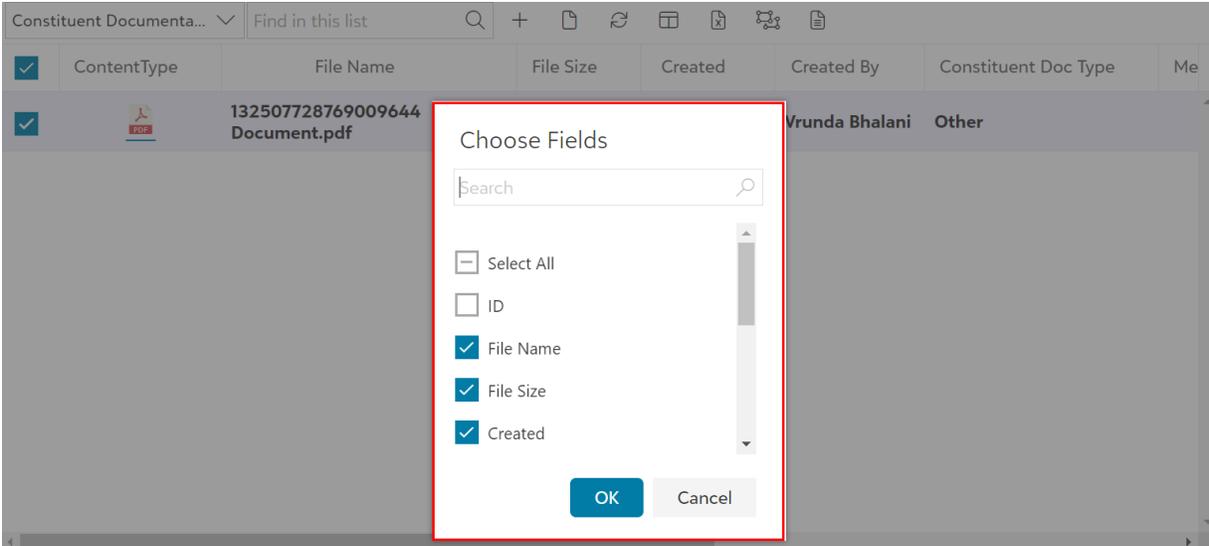
You can set your user preferences to manage what information is displayed in the list by adding or removing columns based on what's important to you using Choose Fields.

To choose fields, follow the steps below:

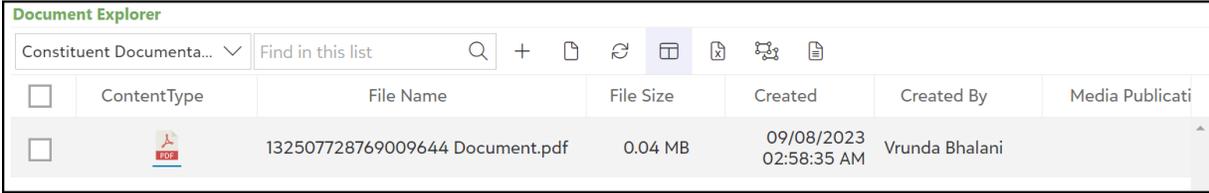
- 1) Click on "CHOOSE FIELDS" option in the list toolbar as shown in the below screen.



- 2) As you click on "CHOOSE FIELDS" option, a dialog box will appear where you can select the desired fields to be displayed in the list.



3) As you uncheck certain fields from the "Choose Fields" dialog box and click OK, the list will be displayed with the selected header fields only.



4) Fields Selected "By default"

- If you are accessing the "Choose Fields" option for the first time, then upon accessing "Choose Fields" option, it will load all the default fields (columns).
- Similarly, if you have already chosen the fields to be displayed, then upon accessing "Choose Fields" option, it will load the fields (columns) which were chosen last time, and remaining fields will appear as unchecked.

5) Selecting the fields to be displayed

To view certain fields on the List, select the field using respective checkbox (blue tick mark will appear on selecting the checkbox). Then, click on "OK" to save the changes.

**Tip:** If the field list is too long, scroll down to view the remaining fields or Type desired field name in the search box to view the corresponding fields.

**Warning:** You cannot uncheck all the fields in the list.

6) Click **Cancel** to cancel the changes made in "Choose Fields"

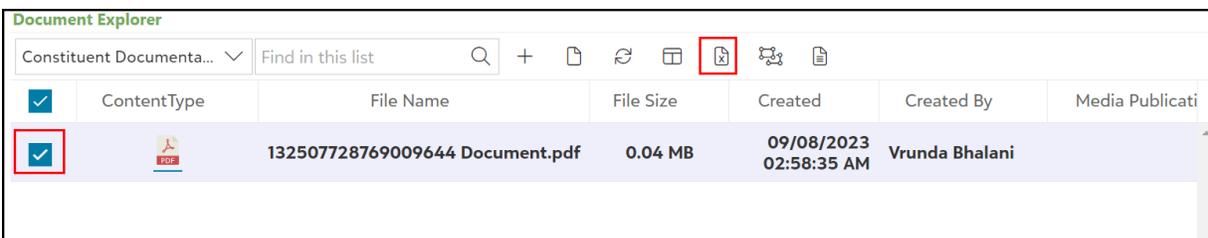
7) Click **Close** to exit the choose fields window without saving any changes.

## Export to Excel from PaperSave Options

This option allows you to export the documents in the current list to an excel file.

**Note:** Note: This option creates an MS Excel file with links to the documents, which is useful when you want to share with users outside of the system in cases such as an audit.

1) Click on "Export to Excel" option from the list toolbar to export the documents in the list to Excel File as shown below. An Excel file titled "PaperSave export.xlsx" will be auto downloaded.



<input checked="" type="checkbox"/>	ContentType	File Name	File Size	Created	Created By	Media Publicati
<input checked="" type="checkbox"/>		132507728769009644 Document.pdf	0.04 MB	09/08/2023 02:58:35 AM	Vrunda Bhalani	

**Note:** Note: In the exported Excel file, the fields that contain hyperlinks will be blank due to security reasons. It will be only visible in edit mode of Microsoft Excel.

**Tip:** Tip: Export to Excel option is available for different modules across PaperSave. Hence, the documents in the list may vary but the basic functionality of exporting the documents in that list to an Excel file remains the same.

## View Interrelated documents from PaperSave Options

**Note:** Multi Association is known as Interrelationship in PaperSave 7.0

Interrelationship helps the databases of PaperSave integrated applications to derive inter-relationships between PaperSave documents by discovering interrelationships between the integrated application's records.

Here, the interrelationship guides the inner-relationships of the integrated application's record types along with records from the PaperSave database. It allows you to create a dynamic interrelationship between two integrated applications record types or within the same integrated application record type.

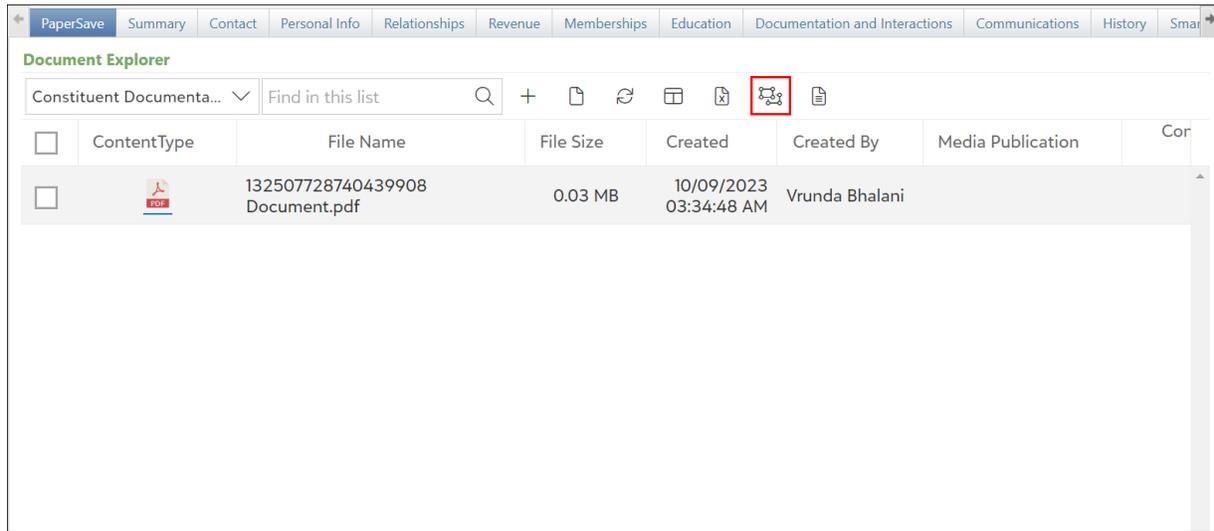
This option allows you to view the respective interrelated documents.

1) Click on "Interrelated" option from the list toolbar to view all interrelated documents, as shown below.

**Note:** Note:

**Note:** All documents that are added through side by side entry from PaperSave to BBCRM having common constituent id are displayed in Interrelate option.

2) Now, it opens the interrelated document list window of PaperSave application. If there are multiple documents interrelated with the BBCRM record, then PaperSave document list is displayed, as shown in the below screen. However, if there is only one document, then the document is directly opened in the document viewer.



3) PaperSave document list window contains the list toolbar with the following options:

- **Refresh:** This option updates the recent changes in the show document list.
- **Filter:** This option allows you to narrow down the documents in the list by applying filter conditions. Learn more about Filter.
- **Show Grouping:** This option helps you to cluster the documents in the list based on the desired header fields. Learn more about Show Grouping.
- **Choose Fields:** This option allows you to set desired preferences for the fields to be displayed in the current list using Choose Fields. Learn more about Choose Fields.
- **Export to Excel:** This option exports the current list of documents to a Microsoft Excel Sheet. Learn more about Export to Excel.

PaperSave Documents that are interrelated to this root

Search within document list

REFRESH FILTER SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

Content Type	File Name	File Size	Created	Created By	Record Type	Document Type	Company Name	Host Application
	610008 - 20230922 - 014325.pdf		09/22/2023 07:20:15 AM	PaperSave System	Revenue	Revenue Documentation	QAUAT.BBInfinity	Blackbaud Entry
	TIFF.tif	0.31 MB	09/22/2023 07:34:58 AM	Sahil Patel	Revenue	Revenue Documentation	QAUAT.BBInfinity	Blackbaud Entry

1 of 1 pages (2 items)

4) When you select the desired document from the list, a slide-up panel will open at the bottom of the screen, as shown below.

PaperSave Documents that are interrelated to this root Constituent

Search within document list

Root Constituent  
 Constituent ID: 8D1977A5-0864-473C-AC61-C9B0AE89DE30  
 Lookup ID: 222  
 Constituent Type: Individual  
 Constituent Name: Franklin Andrews  
 Last: Andrews  
 First: Franklin  
 Middle: Street  
 City: State  
 Zip

REFRESH FILTER SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

Content Type	File Name	File Size	Created	Created By	Record Type	Document Type	Company Name	Host Application
<input checked="" type="checkbox"/>	610008 - 20230922 - 014325.pdf		09/22/2023 07:20:15 AM	PaperSave System	Revenue	Revenue Documentation	QAUAT.BBInfinity	Blackbaud Entry
<input type="checkbox"/>	TIFF.tif	0.31 MB	09/22/2023 07:34:58 AM	Sahil Patel	Revenue	Revenue Documentation	QAUAT.BBInfinity	Blackbaud Entry

OPEN PRINT SHARE DOWNLOAD DELETE

- The slide-up panel contains the following options:

- o **OPEN**: This option opens the selected document in an document viewer.

- o **PRINT**: This option enables you to print the selected document from the list.

Note: Currently, PRINT functionality is under development.

- **SHARE**: You can share the selected documents from the list using any of the below options:

- o **eMail file**: Share document via eMail.

- o **eMail link**: Share link of the document via eMail.

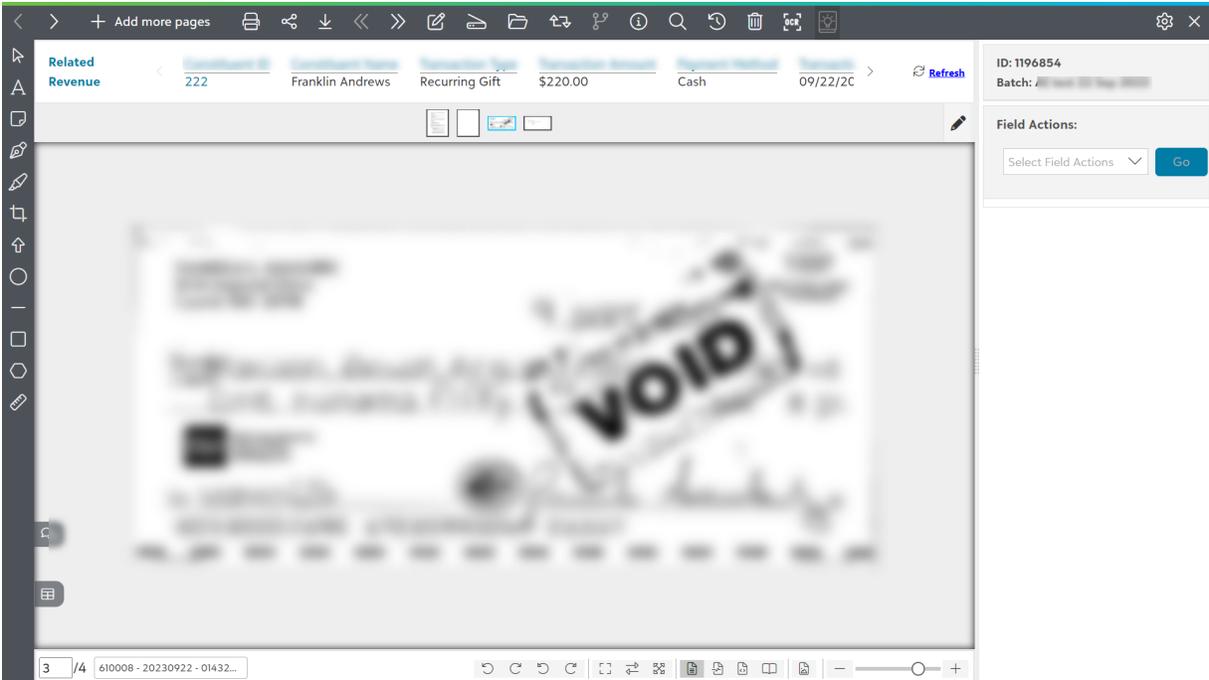
- o **Copy Link**: Create the shareable links of the selected documents.

- **DOWNLOAD**: You can download the selected documents from the list. Learn more about the Download option.

- **DELETE**: You can permanently discard the unnecessary documents from the current list using the Delete option.

**Note:** Note: The Delete option remains enable only if the current user has the rights to delete the document within the selected document type. These rights could be managed from the Document types in the Configuration Area.

5) Now, click on the ID hyperlink or double-click on the desired document in the document list to view the document in the document viewer, as shown in the below screen.



6) In addition to viewing interrelated documents directly from a Blackbaud CRM record, you can also view the interrelated documents by using the below option:

- [Browse Area](#)

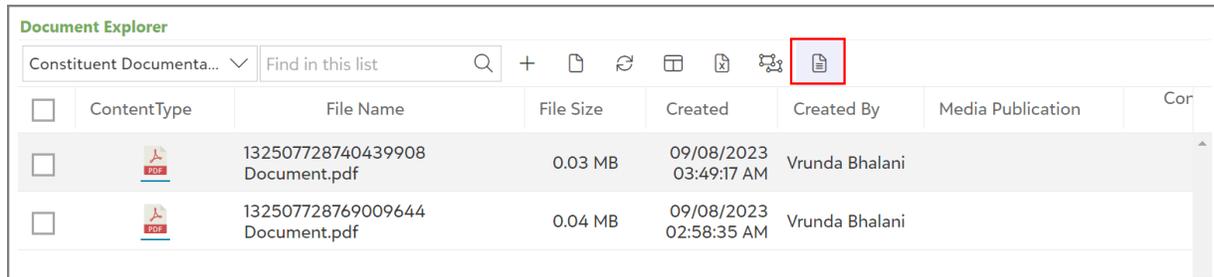
## Show Document List within PaperSave options

You can view the documents added within Blackbaud CRM records by using the Show Document List option in PaperSave options.

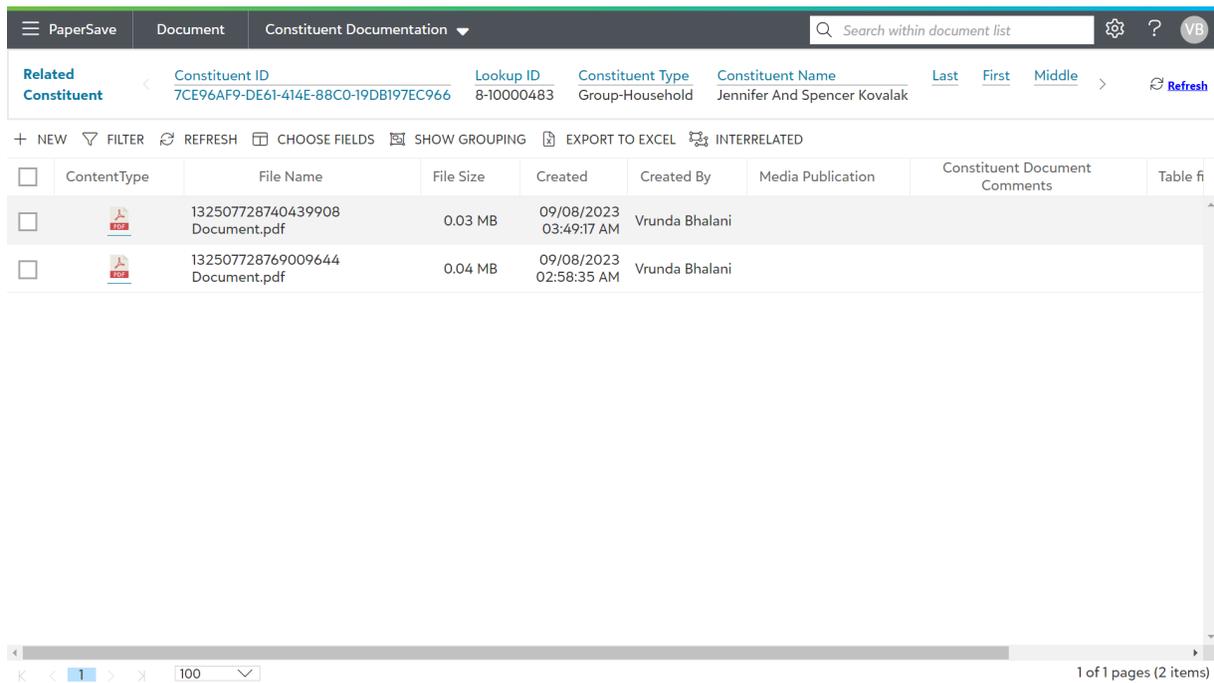
**Tip:** See this topic to view the steps to open a Blackbaud CRM record type to view and access the Paper-Save options.

To view PaperSave documents associated with Blackbaud CRM records follow the below steps:

1) Click on Show Document from PaperSave Grid Toolbar.



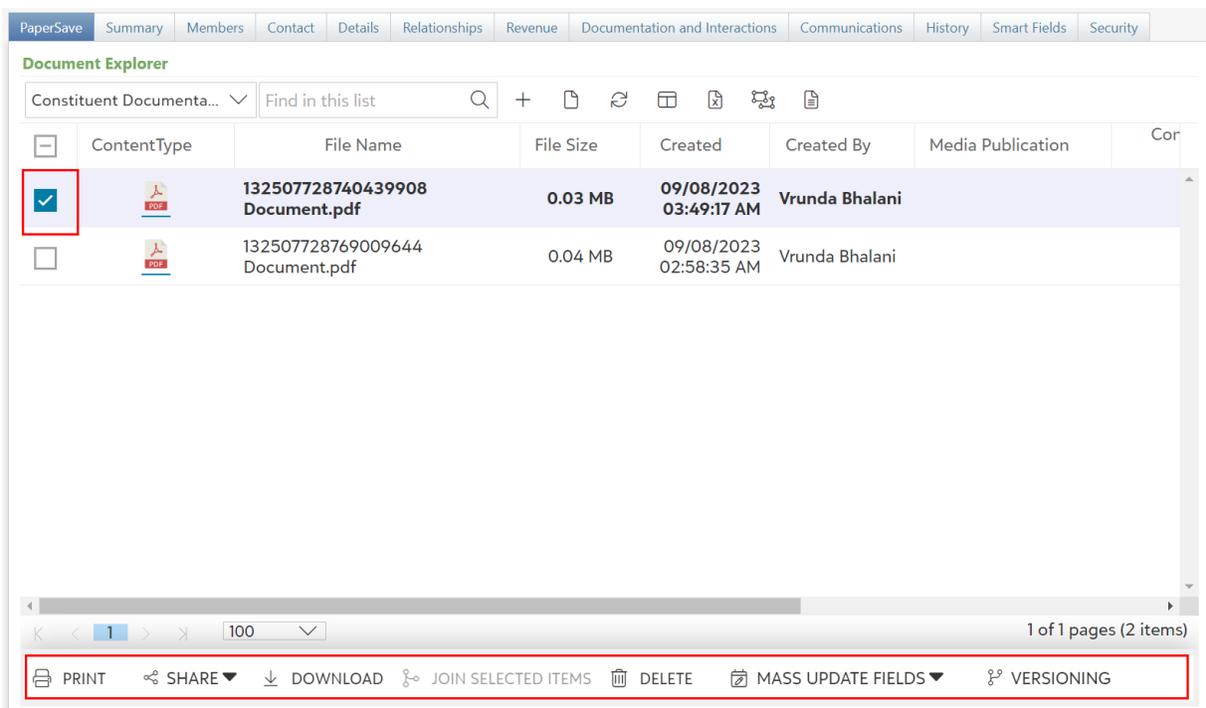
2) This will open Document Display window of PaperSave application. If there are multiple documents associated with a Blackbaud CRM record, then PaperSave document list as shown in the below screen.



**Note: Note:** If there is only one document associated with the Blackbaud CRM record, then upon clicking the Show Document, the document will directly open in the item viewer (Document Display) window.

## Slide up Toolbar options in PaperSave options

PaperSave provides a slide up toolbar that allows various operations to be performed on single or multiple documents. The slide up toolbar shall pop up from the bottom of the screen on selecting one or more documents from the list as shown below.



The screenshot displays the PaperSave interface with a navigation bar at the top containing tabs: PaperSave, Summary, Members, Contact, Details, Relationships, Revenue, Documentation and Interactions, Communications, History, Smart Fields, and Security. Below this is the 'Document Explorer' section, which includes a search bar and a list of documents. The first document, '132507728740439908 Document.pdf', is selected, indicated by a blue checkmark in a red-bordered box. The second document, '132507728769009644 Document.pdf', is not selected. At the bottom of the screen, a slide-up toolbar is visible, containing the following options: PRINT, SHARE, DOWNLOAD, JOIN SELECTED ITEMS, DELETE, MASS UPDATE FIELDS, and VERSIONING. The toolbar is also highlighted with a red border.

Content Type	File Name	File Size	Created	Created By	Media Publication	Cor
<input checked="" type="checkbox"/>	132507728740439908 Document.pdf	0.03 MB	09/08/2023 03:49:17 AM	Vrunda Bhalani		
<input type="checkbox"/>	132507728769009644 Document.pdf	0.04 MB	09/08/2023 02:58:35 AM	Vrunda Bhalani		

The slide up toolbar contains the following options are:

### PRINT

This option enables you to print the selected document from the document list.

**Note:** N This feature is not yet available in the new PaperSave user experience. However, you can use it from legacy user experience by clicking on the "Open in Legacy View" button.

Document Explorer

Constituent Documenta... Find in this list

<input type="checkbox"/>	ContentType	File Name	File Size	Created	Created By	Media Publication	Cor
<input checked="" type="checkbox"/>		132507728740439908 Document.pdf	0.03 MB	09/08/2023 03:49:17 AM	Vrunda Bhalani		
<input type="checkbox"/>		132507728769009644 Document.pdf	0.04 MB	09/08/2023 02:58:35 AM	Vrunda Bhalani		

1 of 1 pages (2 items)

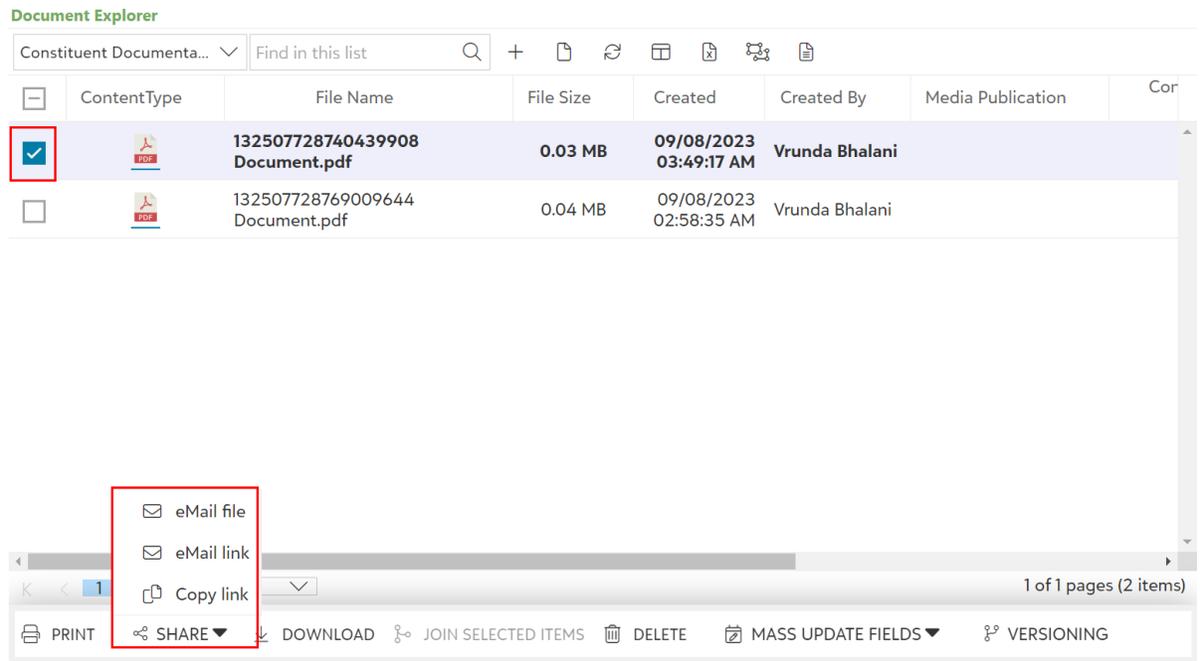
**PRINT** SHARE DOWNLOAD JOIN SELECTED ITEMS DELETE MASS UPDATE FIELDS VERSIONING

**Note: Note:** This option also prints the annotations on the document, if any.

## SHARE

You can share the documents from the list using any of the below options:

- Share document via eMail
- Share the link of the document via eMail
- Copy Link



## DOWNLOAD

You can download the selected documents from the list. Learn more about the Download option.

## JOIN SELECTED ITEMS

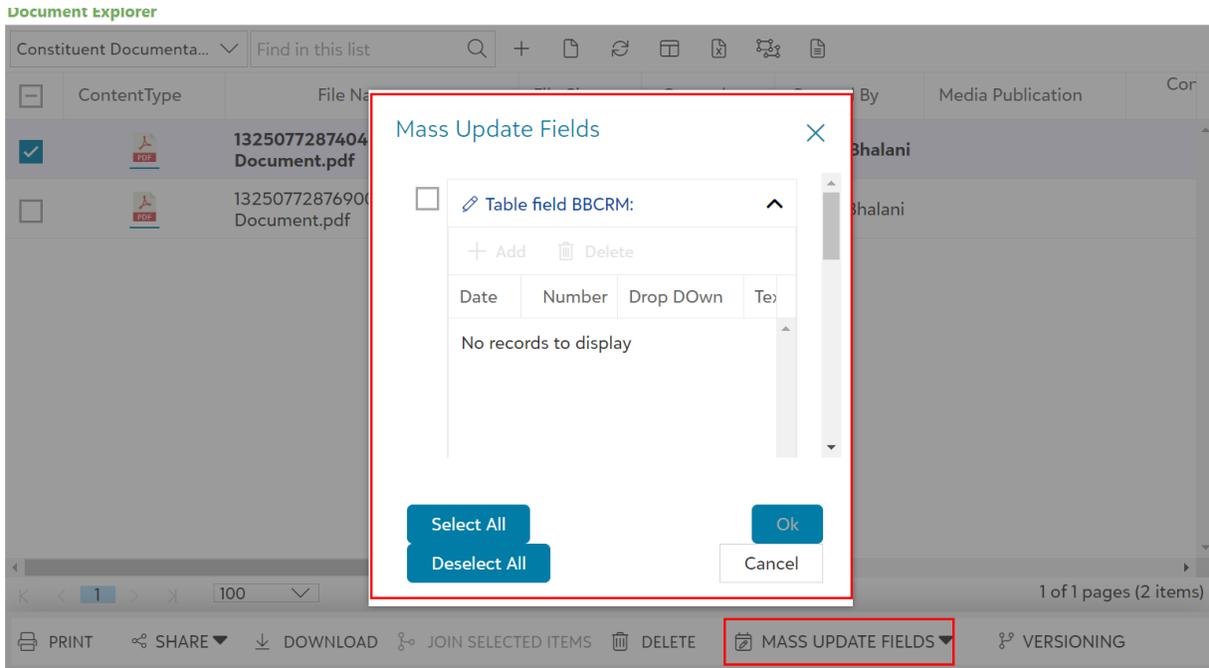
This option allows you to join documents . This option is based on the current user's role and permissions. Learn more about the Join Selected Items option.

## DELETE

You can permanently discard the unnecessary documents from the current list using the Delete option. Learn more about the Delete option.

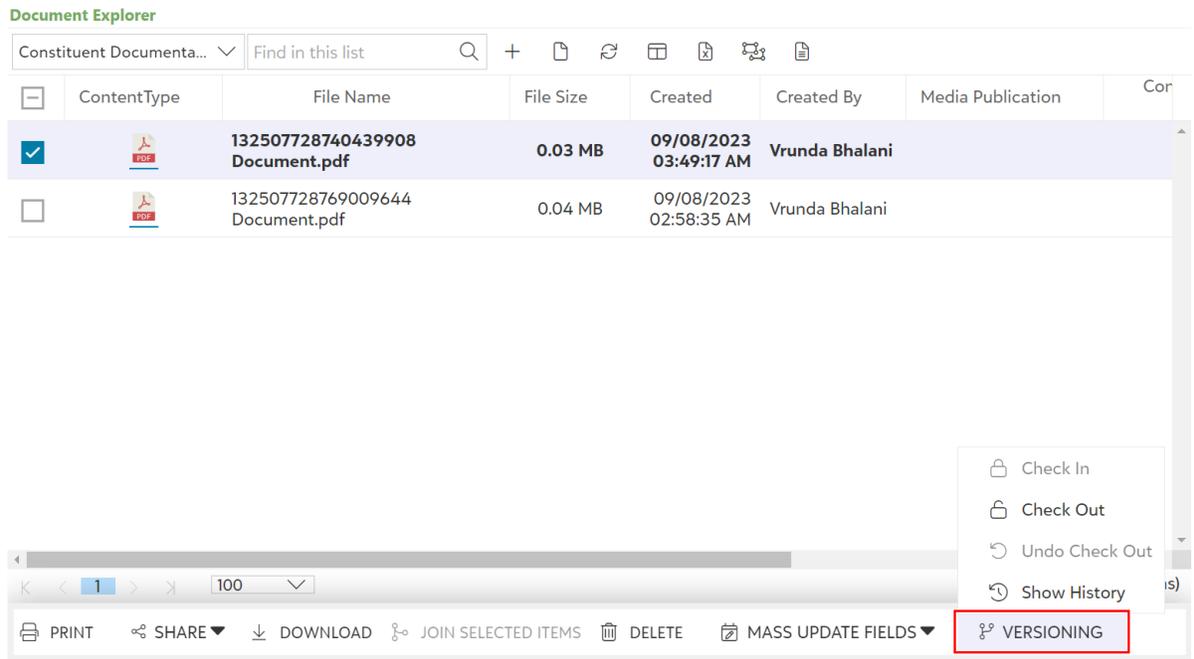
## MASS UPDATE FIELDS

The "Mass Update Fields" option allows you to quickly change field value(s). Click on the Mass update fields option to choose the desired template from the given list of templates.



Watch the video to know how to use Mass Update Fields to modify the field values for selected documents.

**VERSIONING:** This option is used to control the changes made in different versions of the selected document. Click on this option to see the various versioning options as shown in the below screen.



### Note:

**Note:** 1) Versioning must be enabled for the Document type in the Configuration area. Otherwise, this option will be grayed out (disabled).

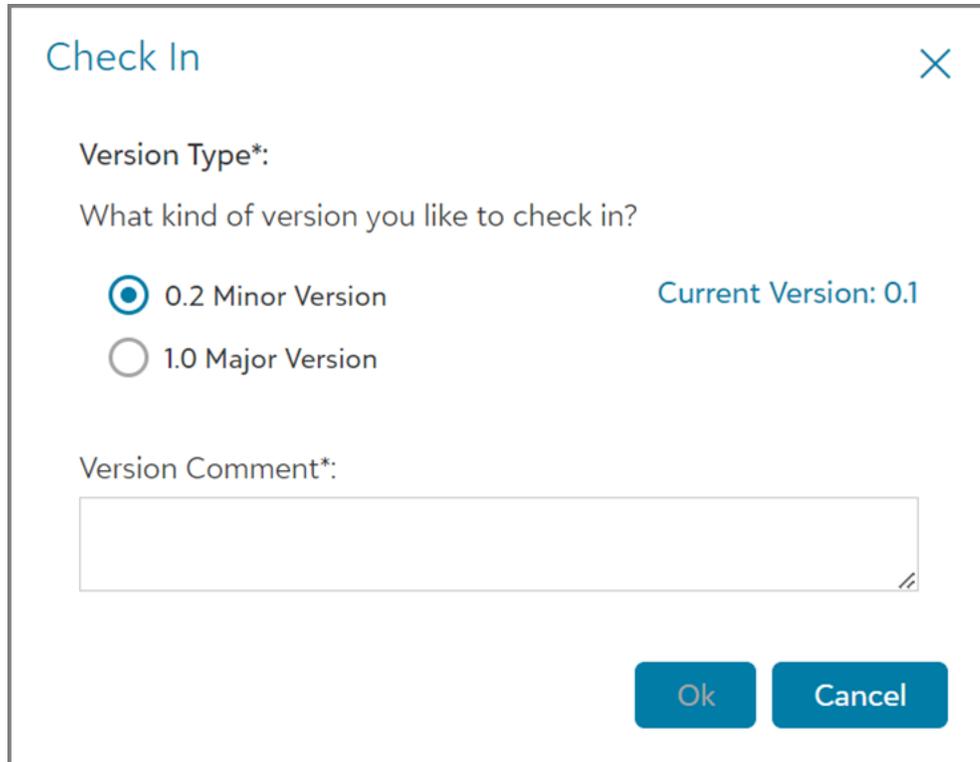
**Note:** 2) Now, if versioning is enabled, then a current user must have edit document rights on the selected document type and this could be managed from the document types tile in the Configuration Area.

### Note:

Following is the description of various options available in Versioning:

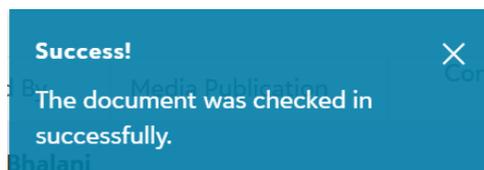
- **Check In:** This option is used to save the changes made to the selected document so that those changes are reflected to other users. You can check in only those documents that are checked out or are checked in for the first time after being added. Clicking on the Check In button will open a pop-up where you need to select the Version Type (Minor or Major) and add a Version Comment to track the changes made to the document. Click on the Ok button to save the document and check-in details or cancel to close the document check in process without saving the changes

After clicking on OK, you will see a success or failure confirmation.



The image shows a 'Check In' dialog box with a title bar containing the text 'Check In' and a close button (X). The main content area includes a label 'Version Type\*' followed by the question 'What kind of version you like to check in?'. There are two radio button options: '0.2 Minor Version' (which is selected) and '1.0 Major Version'. To the right of these options, the text 'Current Version: 0.1' is displayed. Below the radio buttons is a label 'Version Comment\*' and an empty text input field. At the bottom right of the dialog are two buttons: 'Ok' and 'Cancel'.

- **Check Out:** This option will check out the selected document, which will enable you to make changes to the document. You need to check out the document to make any changes.



- **Undo Check Out:** This option will undo all the changes made to the document after the latest check-out was made to the document and revert to the prior checked-in version of the document.



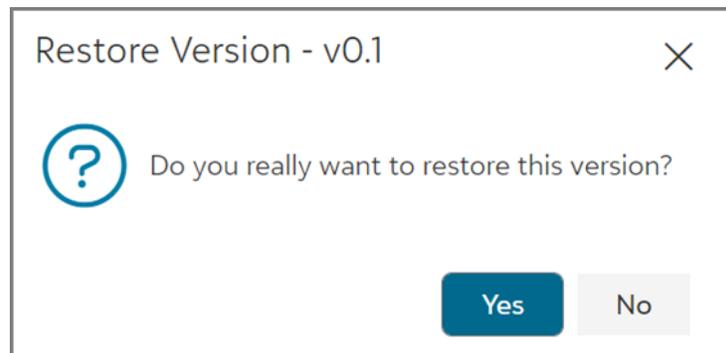
- **Show History:** This option will display the history of all the changes made to the selected document, including the Version, Name of the User who checked in, and the Last modification time.



- o You can also view the document by clicking View , which will open that version in a pop-up window.



- o You can click on Restore if you wish to revert to the selected version of the document. It will prompt confirmation before restoring the document. Once you click on Yes you will get the success message as shown below.



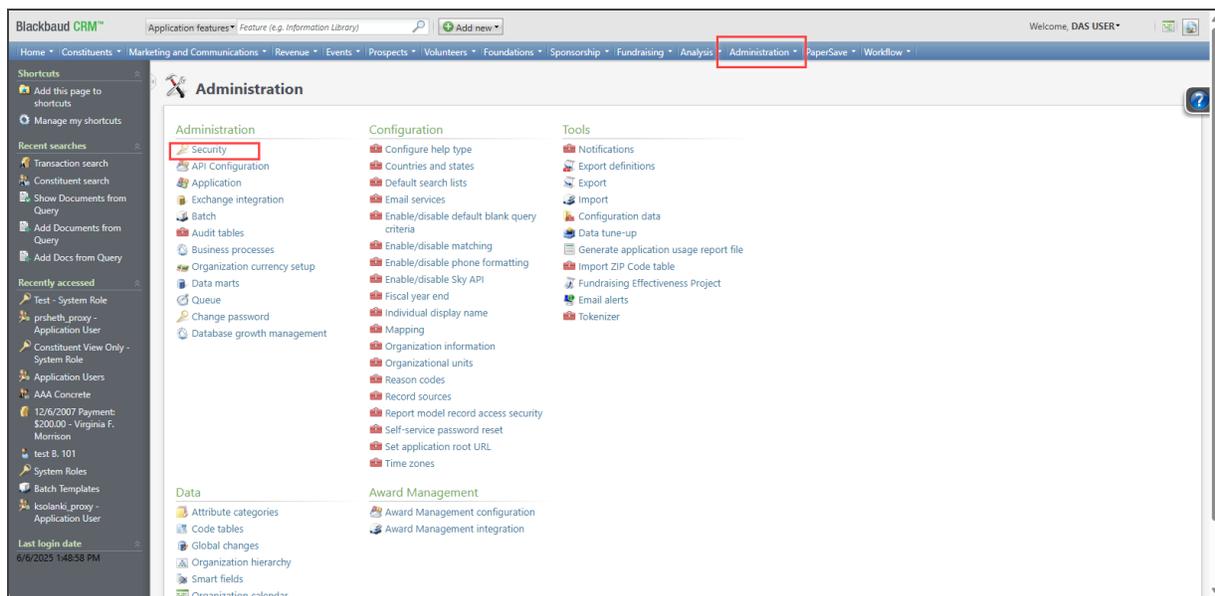
o Once you click on Yes you will get the success message as shown below.



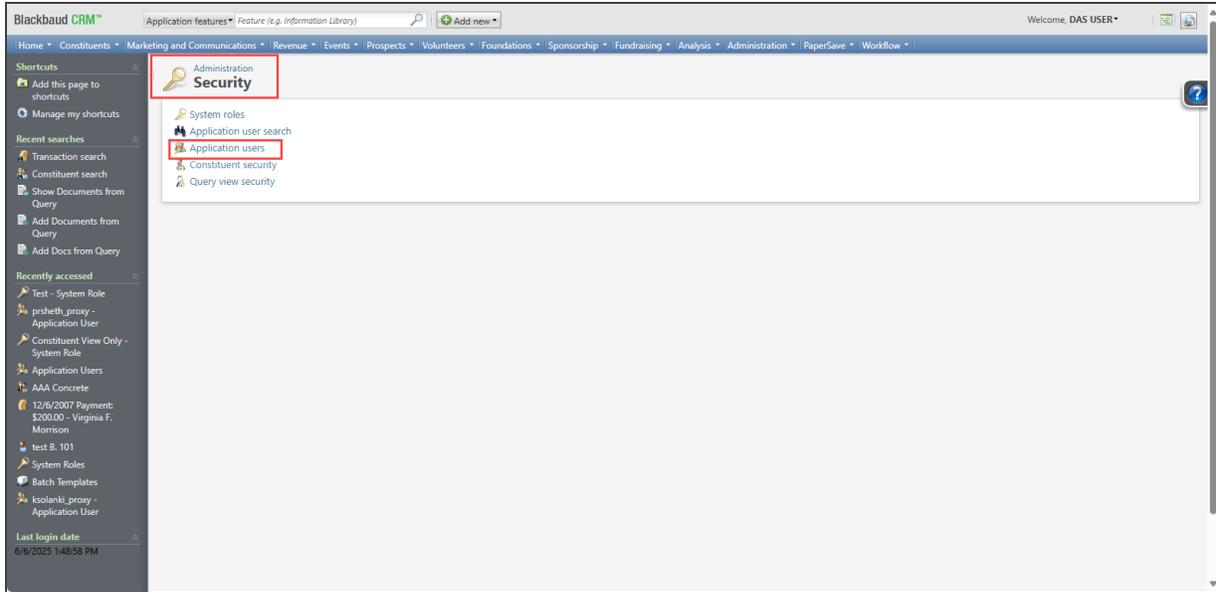
# Creating Proxy User in Blackbaud CRM

To create Proxy User, please follow the below steps:

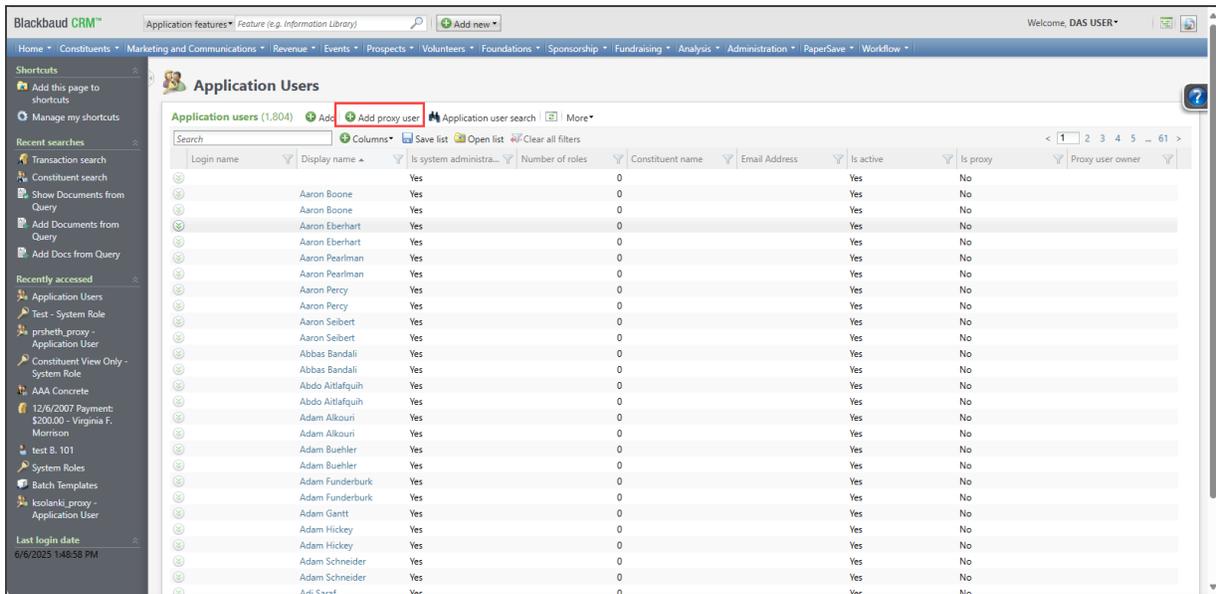
1) Open the Blackbaud CRM application, navigate to **Administration**, and select **Security**.



2) In the Security page, click on **Application Users** as shown below.

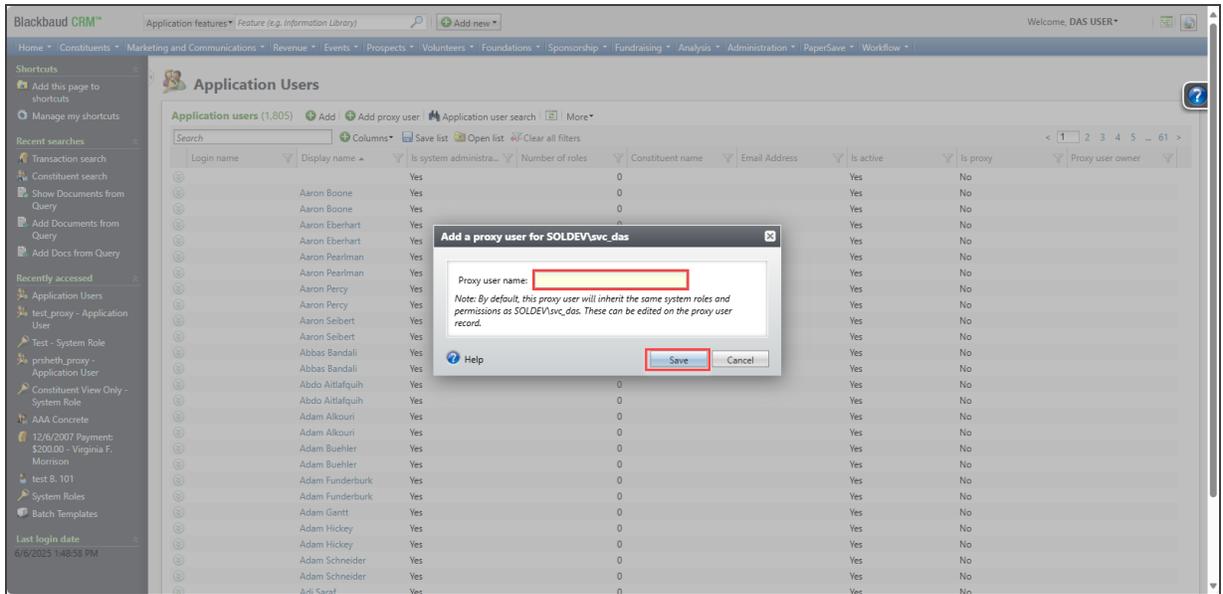


3) On the Application Users page, click on the + **Add Proxy User** option as shown below.



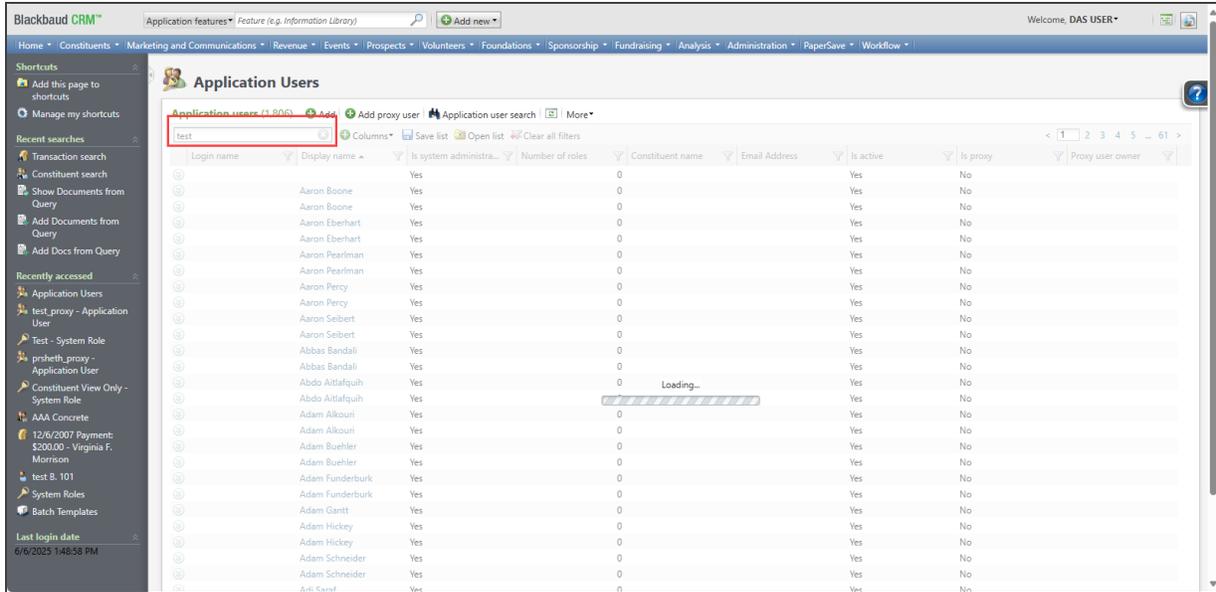
4) A confirmation dialog appears to add a proxy user for the currently logged-in user as shown below.

- **Proxy User Name:** Enter a valid name for the proxy user.

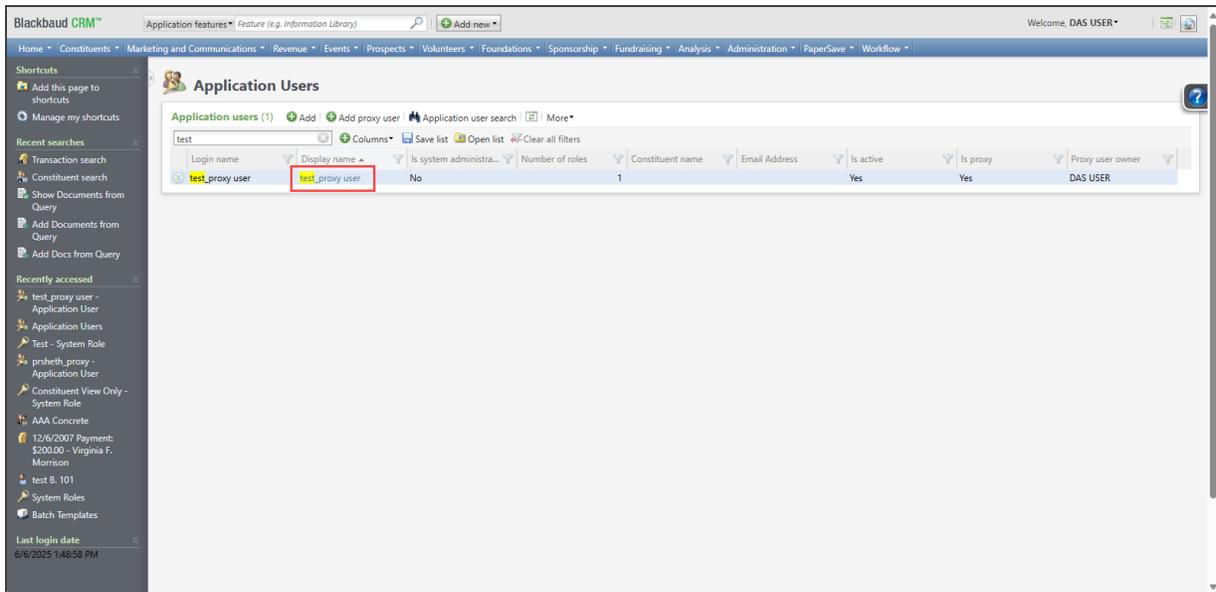


**Note:** By default, the proxy user inherits the same system roles and permissions as the logged-in user. These can be edited later from the proxy user's record.

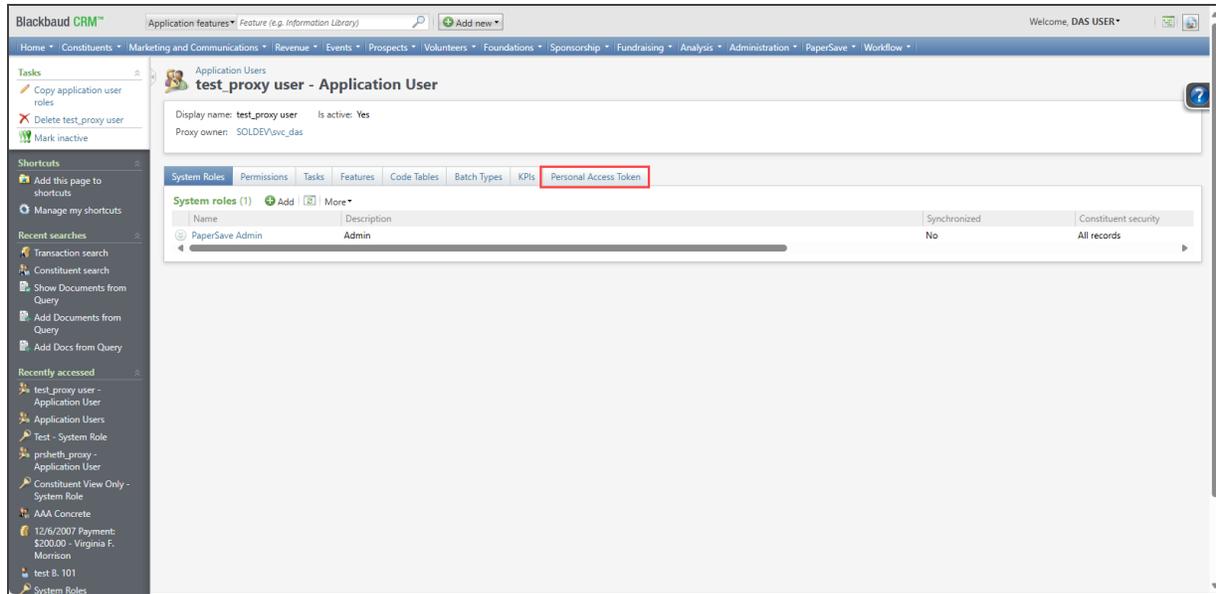
- 5) Click on the **Save** button to save the created proxy user.
- 6) Use the search bar to locate the proxy user you have created as shown below.



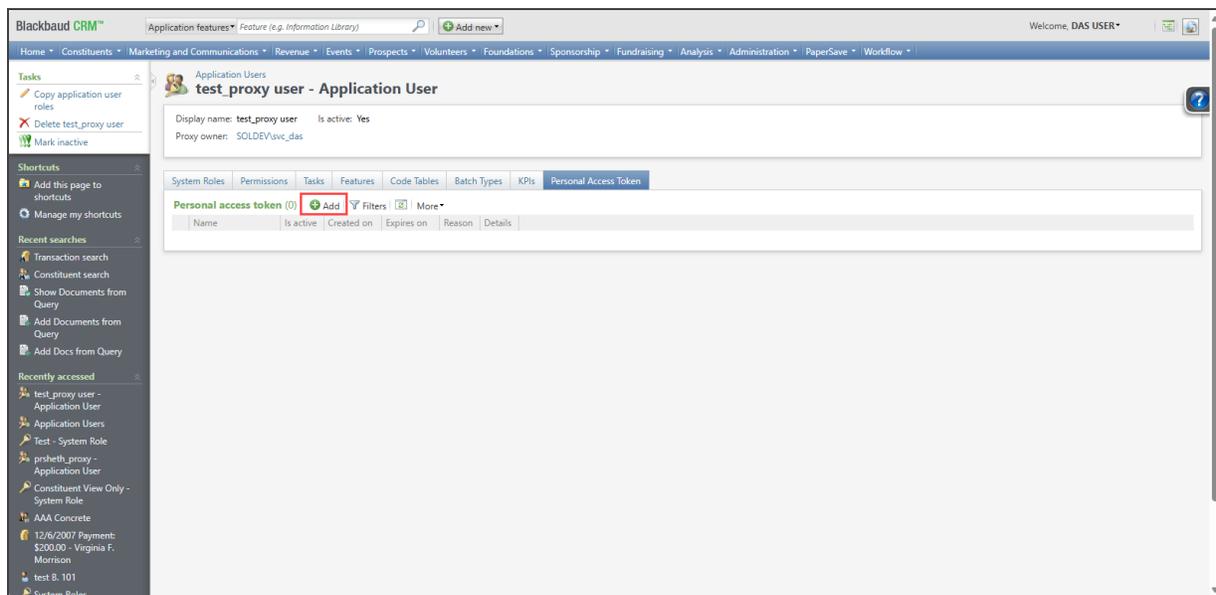
7) Click on the Display Name of the proxy user as shown below.



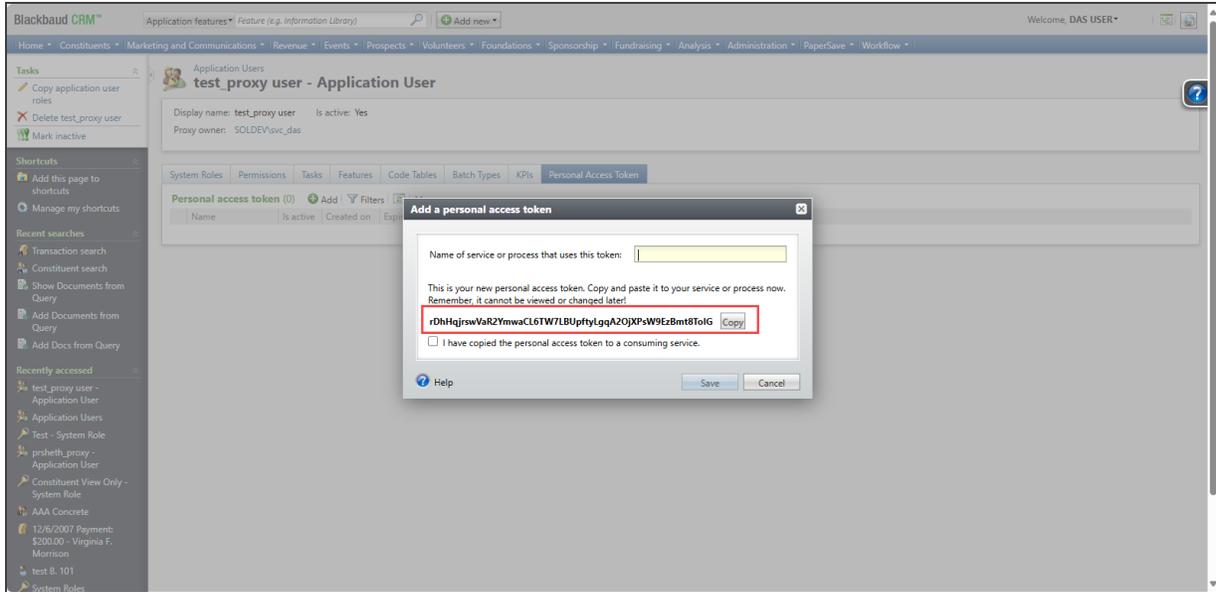
8) Navigate to the **Personal Access Token** tab as shown below.



9) Click on the **+Add** option to add a new personal access token.

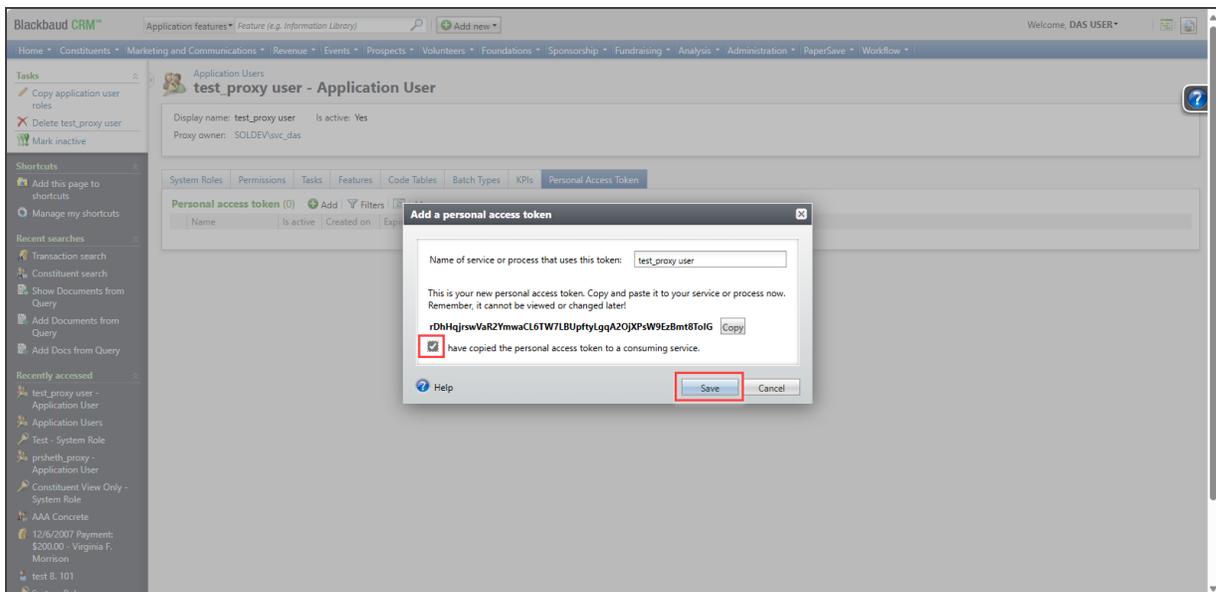


10) Enter a meaningful name for the token in the dialog box that appears as shown below.



**Note:** Make sure to copy and securely store the Personal Access Token and the entered name, as they cannot be viewed or retrieved later. These details will be required when adding the integrated app instance.

11) Now, tick the checkbox confirming that you have copied the personal access token, and then click on the **Save** button.

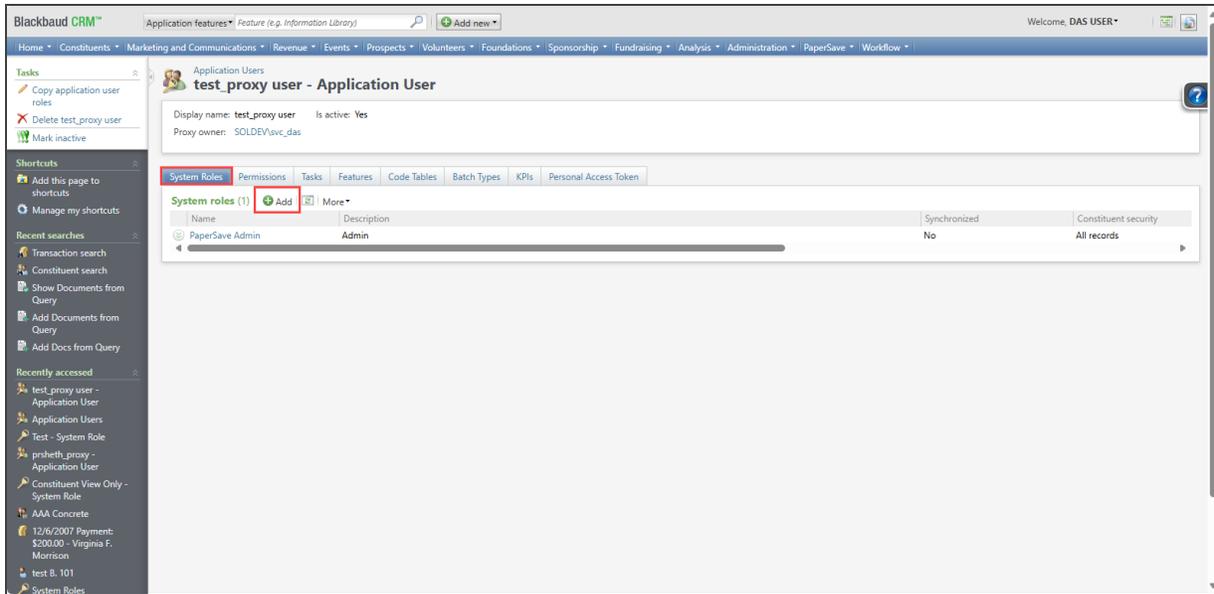


12) In the Personal Access Tokens tab, you will now see the token details and its expiration date.

The screenshot shows the Blackbaud CRM interface. The main content area displays the profile for 'test\_proxy user - Application User'. The 'Personal Access Token' tab is selected, showing a table with one token entry. The table has columns for Name, Is active, Created on, Expires on, Reason, and Details. The entry for 'test\_proxy user' is highlighted with a red box.

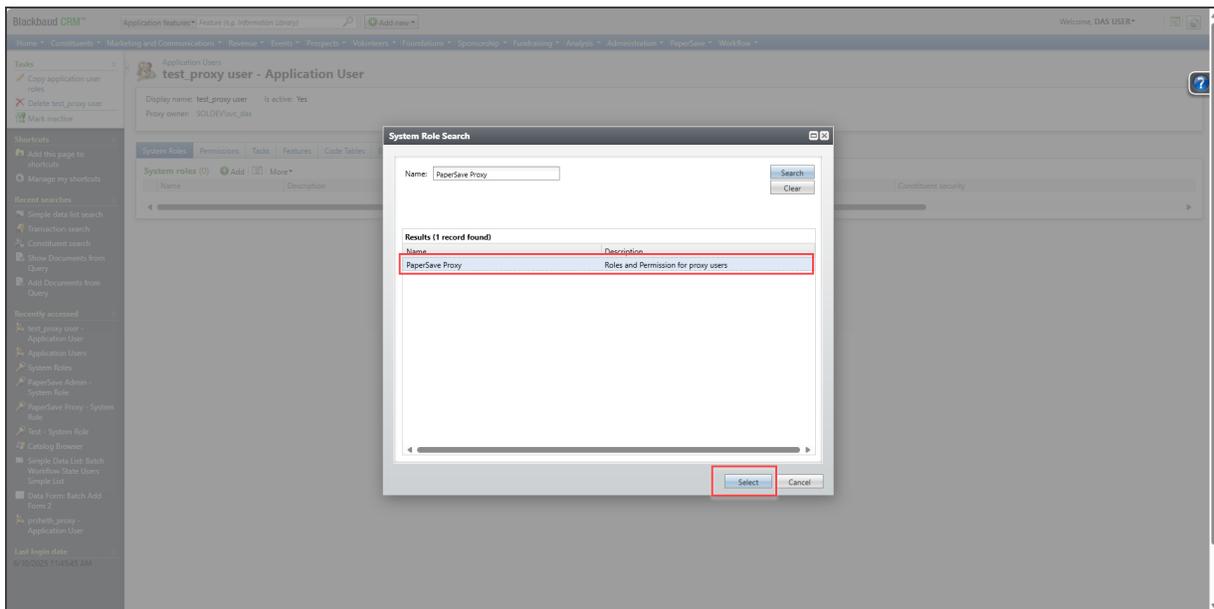
Name	Is active	Created on	Expires on	Reason	Details
test_proxy user	Yes	6/6/2025	6/6/2026		

13) Navigate to the **System Roles** tab and click on the + **Add** button to assign the system role to the proxy user as shown below.

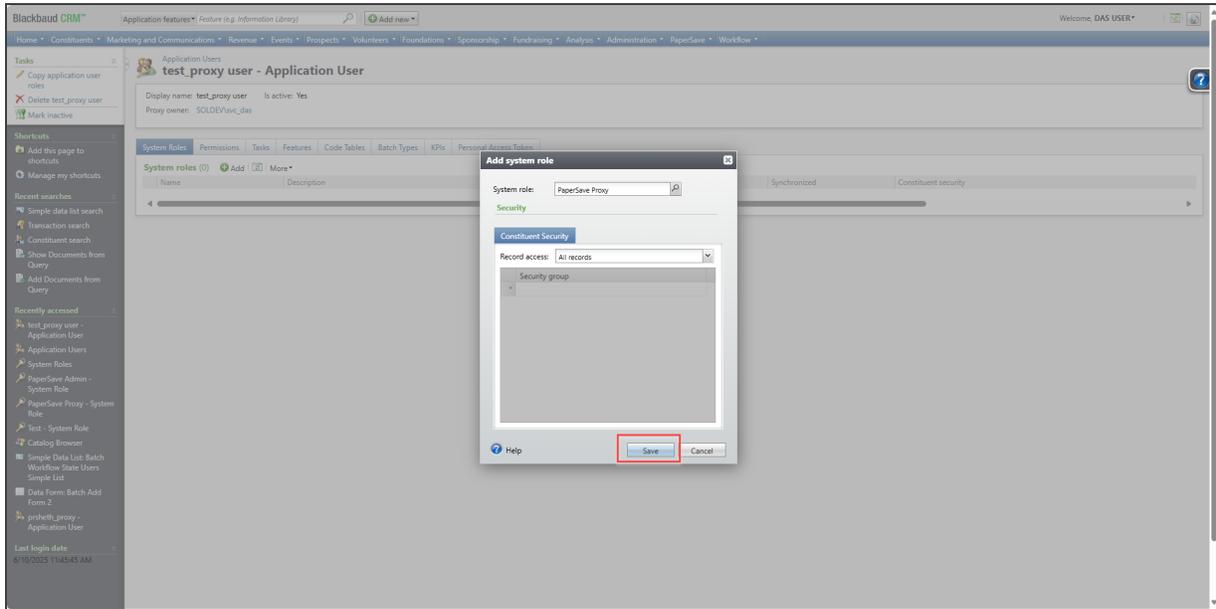


**Note:** Click [here](#) to learn how to create a system role for a proxy user.

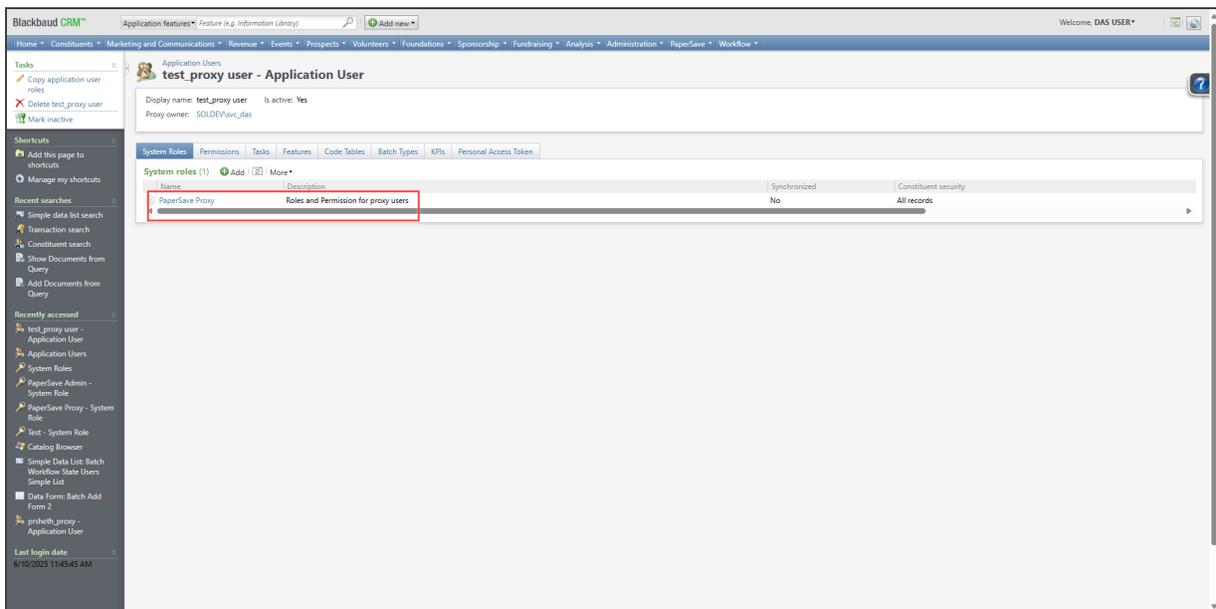
14) Now, search for the system role you created for the proxy user and select it as shown below.



15) After selecting the role, click the **Save** button to assign it to the proxy user.

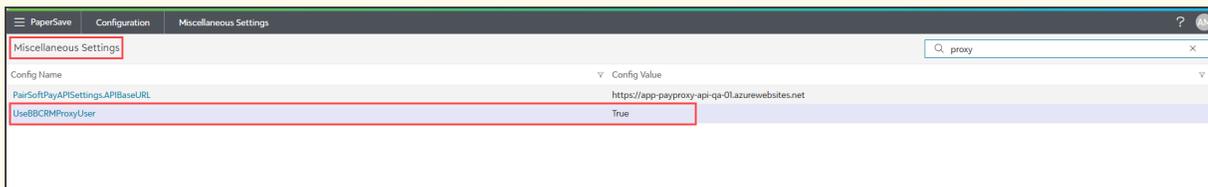


16) Once saved, the assigned role will appear under the System Roles tab for the proxy user as shown below.



**Note:** Click [here](#) to learn how to configure the company in PaperSave for the proxy user.

**Tip:** To allow the proxy user to access the PaperSave application, define **UseBBCRMProxyUser** to **True** in the Miscellaneous Settings section of the PaperSave Configurations area. This ensures proper authentication and seamless integration.

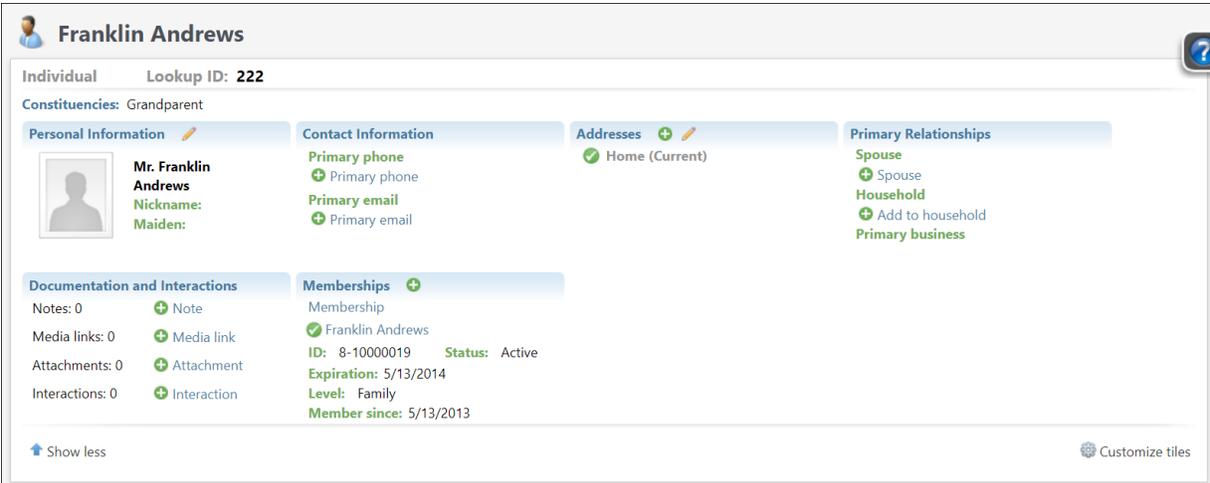


# Side by Side Entry

This PaperSave feature allows you to directly associate the workflow item to the BBCRM record. Side by side entry option will appear only when the selected Workflow step has defined "Can Associate" Activity as true.

Follow the below steps to perform Side by side entry:

1) Locate the Lookup id of the constituent in BBCRM for which you want to perform Side by Side Entry. Let's say, the Look up id 222.



2) Open PaperSave Workflow Area and select the desired workflow and the step where you have defined 'Can Associate' activity as true.

PaperSave Workflow									
QA BBCRM Revenue AE OCR Swift									
Choose Step									
Search within workflow item list									
NEW REFRESH FILTER GROUP BY AND SUBTOTAL CHOOSE FIELDS EXPORT TO EXCEL									
	ContentType	ID	Created	Step	Owner	Batch	FileName	File Size	Company
<input type="checkbox"/>		<a href="#">930347</a>	09/25/2023 03:58:20 AM	Entered		2509	132507728794561780 Document.pdf	0.03 MB	QAUAT.BBInfinity
<input type="checkbox"/>		<a href="#">930346</a>	09/25/2023 03:53:54 AM	Submit To BBCRM	Rajni Sharma	25092923	132507728794561780 Document.pdf	0.03 MB	QAUAT.BBInfinity
<input type="checkbox"/>		<a href="#">930335</a>	09/22/2023 09:23:07 AM	Entered		222	132507728794561780 Document.pdf	0.03 MB	QAUAT.BBInfinity
<input type="checkbox"/>		<a href="#">930324</a>	09/22/2023 07:19:35 AM	Entered		AE test 22 Sep 2023	610008 - 20230922 - 014325.pdf	0.07 MB	QAUAT.BBInfinity
<input type="checkbox"/>		<a href="#">930308</a>	09/21/2023 09:10:16 AM	Entered		Smoke Test 21 Sep 2023	Interview.pdf	0.07 MB	QAUAT.BBInfinity
<input type="checkbox"/>		<a href="#">930294</a>	09/21/2023 08:38:49 AM	Rejected By BBCRM	Rajni Sharma	21092023	132507728769009644 Document.pdf	0.04 MB	QAUAT.BBInfinity

3) Now add a document to that workflow. While adding a document, make sure to create a batch. Let's say the batch number is 25092023.

### Set Batch & Field Defaults ✕

**Batch:** 25092023 [Auto generate](#)

**▼ Set defaults for this acquisition**

Don't ask me again

OK
Cancel

4) Now, enter all the required details in the fields. Make sure, to keep the Constituent of the Lookup id that is mentioned in Step 1. Here, the constituent is Franklin Andrews with the Lookup id 222. After entering the details, submit the document.

5) Now, open Batch entry in Constituents in BCCRM where you want to perform side by side entry and click on Edit Batch.

#### Batch Entry

Uncommitted Batches
Committed Batches

**Uncommitted batches (6)** + Add Batch search More

Date range: Last 30 days
Sites: All sites
 Show only batches with exceptions
Apply Reset

Search
Columns
Clear all filters

Batch number	Batch template	Description	Owner	Status	Date added	Category	Site	Custom
21092023	Enhanced Reven...		DAS USER	Open	9/21/2023	Revenue	All sites	
222-1	Enhanced Reven...		DAS USER	Open	9/22/2023	Revenue	All sites	
2509	Enhanced Reven...		DAS USER	Open	9/25/2023	Revenue	All sites	
25092023	Enhanced Reven...		DAS USER	Open	9/25/2023	Revenue	All sites	
298	Enhanced Reven...	test	DAS USER	Open	9/19/2023	Revenue	All sites	
BBCRM	Enhanced Reven...		DAS USER	Open	9/21/2023	Revenue	All sites	

Edit batch
Edit properties
Update status
Commit
Validation report
Delete
Export

Batch type: Enhanced Revenue Batch  
Date changed: 9/25/2023

6) Now, go to PaperSave Workflow and open the document on which you want to perform side by side entry.

PaperSave Workflow QA BCCRM Revenue AE OCR Swift Submit To BCCRM										
Search within workflow item list										
Content Type	ID	Created	Step	Owner	Batch	FileName	File Size	Company	Compani	
	<a href="#">930346</a>	09/25/2023 03:53:54 AM	Submit To BCCRM	Rajni Sharma	25092923	132507728794561780 Document.pdf	0.03 MB	QAUAT.BBInfinity	9090	
	<a href="#">929013</a>	05/29/2023 04:48:59 AM	Submit To BCCRM	Rajni Sharma	Side By Side Entry	Interview.pdf	0.07 MB	HVTEST51HA.BBCRMUAT	9023	
	<a href="#">929014</a>	05/29/2023 04:48:59 AM	Submit To BCCRM	Rajni Sharma	Side By Side Entry	TIFF.tif	0.31 MB	QAUAT.BBInfinity	9090	

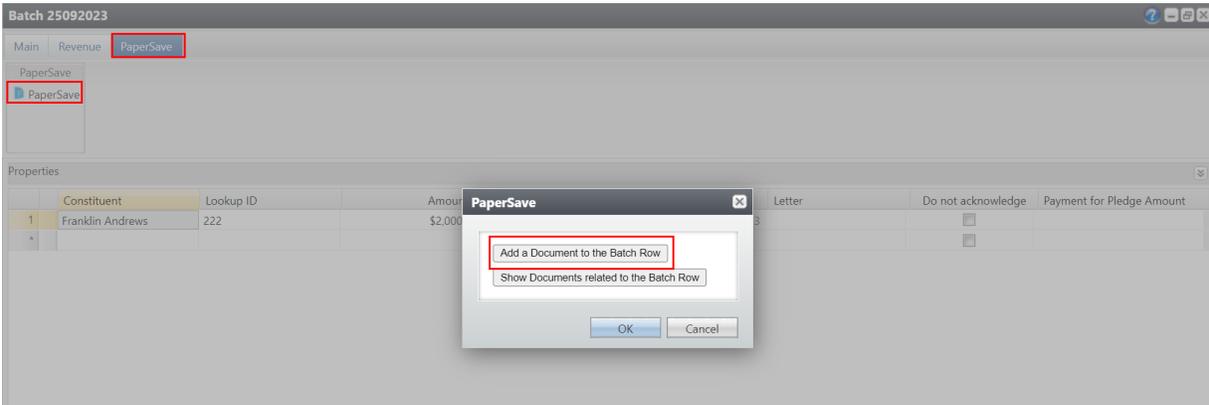
7) The document will look like below. Now, click Start Side by Side Entry.

The screenshot shows a document viewer interface. The main document is a check from Eleanor L Haydock, 1617 Tigertail Ave, Miami, FL 33133, dated 5/29/18, for \$2,000.00 payable to MPAF, LLC. The check is from Grove Bank & Trust. The document number is 4638. The viewer has a toolbar at the top with various navigation and editing tools. A red box highlights the 'Start Side by Side Entry' button in the top right corner. To the right of the document is a form for 'Submit To BBCRM'. The form includes fields for Company (QUAUT.BBInfinity), CompanyID (9090), ConstituentID (Franklin Andrews), Amount (\$2,000.00), Date (09/25/2023), Revenue type (Payment), Designation (Building Fund), Reference, and options for 'Give Anonymously' (True/False) and 'Do Not Acknowledge'/'Do Not Receipt' (Clear).

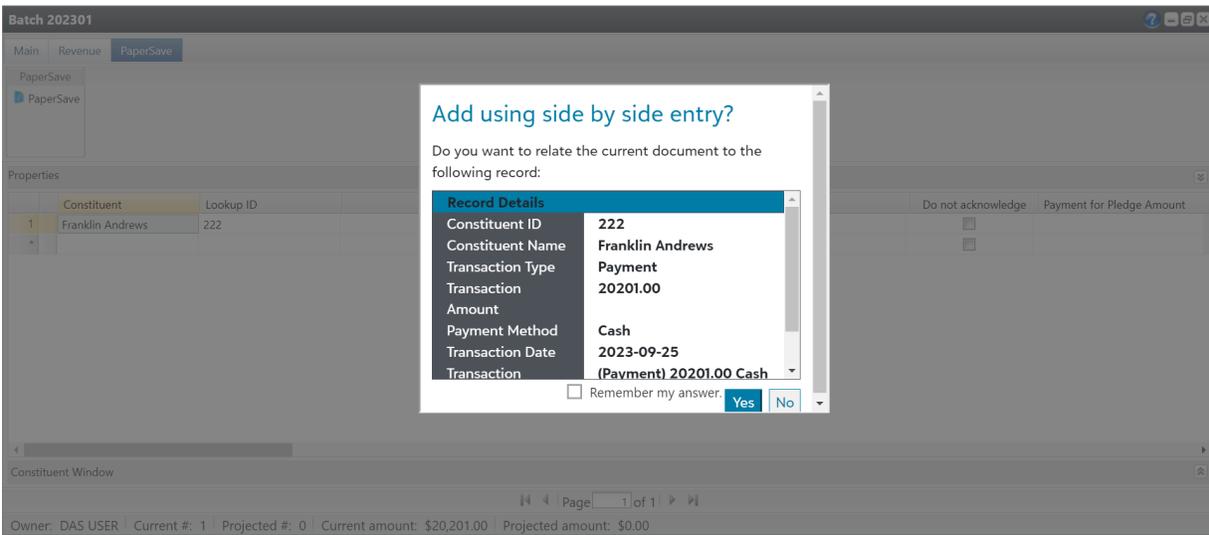
8) A success message is displayed, and a popup opens. Click Ok.

The screenshot shows the same document viewer interface as in the previous image. The 'Start Side by Side Entry' button is now disabled, and the text 'Stop Side by Side Entry' is displayed in the top right corner. A success message 'Congratulations! Submit to BBCRM | Owner: Rajni Sharma successfully.' is shown. A white popup window titled 'Auto execute a workflow action' is centered over the document. The popup contains the text 'Select the workflow action to execute automatically after an item is successfully associated with an integrated app record.' and a 'Workflow action:' dropdown menu. There is also a checkbox for 'Don't ask me again' and 'Ok' and 'Cancel' buttons.

9) Go to BBCRM, click PaperSave tab and click PaperSave option. The following screen appears. Click on Add a Document to the Batch Row.



10) It will prompt a confirmation dialog box to Add document using side by side entry as shown in the below screen.



11) Click on Yes to associate the document and No to cancel the operation.

12) You can view the associated document by clicking Show documents related to the batch row.

13) The following screen appears where you can view two documents, the one created by PaperSave System is the auto entry document and other added by the user.

Content Type	ID	File Name	File Size	Created	Created By
Document.pdf	1196926	132507728794561780 Document.pdf	0.03 MB	09/25/2023 07:23:52 AM	Vrunda Bhalani
Document.pdf	1196917	132507728769009644 Document.pdf		09/25/2023 05:23:39 AM	PaperSave System

14) Once the item is successfully associated, it will auto raise the Workflow event for the added workflow item.

15) Now, you can click on Stop Side by Side Entry, exit the item viewer or close the browser to stop the side by side entry operation.

16) Before performing side by side entry, you can change its settings from the Settings Panel.

The Side by Side Entry Settings contains the options such as:

**Action to execute after associating documents in this session:** You can define the workflow event that should occur once you perform Side by Side Entry.

**Prompt for which action to execute after associating documents:** When this option is enabled, you will get the prompt to select workflow event should occur after Side by Side Entry.

**Note:** Note: By default this option is enabled, but in case you had checked "Don't ask me again" then you can enable from the settings.

**Associate future documents automatically without prompting:** When this option is enabled, the document will automatically get associated to the BBCRM record without prompting any confirmation when clicked on PaperSave Add document from BBCRM record.

**Note:** Note: By default, this option is disabled.

**Note:** Note: Make sure BBCRM is open while performing Side by Side Entry. If the Side by Side Entry operation is started, then the title of the option will be changed to Stop Side by Side Entry. You can click on it once your document is successfully associated to BBCRM record.

17) Now, open the batch entry in BBCRM, update projected totals and validate the process, and then save and close the batch.

18) Now, commit the batch. Once the batch is committed, you can view the documents added through side-by-side entry in revenue batch.

19) Once done, stop side by side entry in papersave.

## Side by Side Entry settings

From the item viewer's settings panel, you can define or update various settings associated to Side by Side Entry. Click on '**Side by Side Entry Settings**' option from the settings panel to view the settings as shown in the below screen:

[← Back To Settings](#)

---

**Side by Side Entry Settings**

**Action to execute after associating documents in this session**

Select the workflow event from the list below which should be raised automatically upon successful association with an integrated application record.

**Prompt for which action to execute after associating documents**

Turning this on will show a prompt each time a user starts a side by side entry session asking for which action the user wants the system to initiate automatically after a workflow item is associated to an integrated app record. Turning this off here or by clicking on the "Don't show me this again" box when prompted for the action will result in the prompt being suppressed. It will also result in no action being initiated by the system automatically after document association.

**Associate future documents automatically without prompting**

Use this option to turn on the automatic association of documents during side by side entry. Turning this option off will prompt for a confirmation before associating the visible document.

The "**Side by Side Entry Settings**" contains the following options:

- **Action to execute after associating documents in this session:** You can define the workflow event that should be auto-raised once you perform Side by Side Entry.

**Note:** This setting is for the current Side by Side Entry session only.

- **Prompt for which action to execute after associating documents:** When this option is enabled, you will get the prompt to select Workflow event should be raised after the Side by Side Entry.

**Note:** By default this option is enabled, but in case you had checked "Don't ask me again" then you can enable it from here.

**Note:** If you don't select the Workflow event to raise automatically, the item will stay in the viewer until you manually raise the event from the field panel.

- **Associate future documents automatically without prompting:** When this option is enabled, the document will automatically get associated to the open Raiser's Edge without prompting any confirmation when clicked on Add Document from Records or Batch section in Raiser's Edge.

**Note:** By default, this option is disabled.

# PaperSave Areas

PaperSave is a complete document management software for Microsoft Dynamics, Microsoft Dynamics 365, Blackbaud, Sage Intacct and Paramount WorkPlace Enterprise. PaperSave's unique integration provides one-click access to documents related to the records within Microsoft Dynamics solutions like GP, SL, and CRM, Microsoft Dynamics 365 solutions like Business Central and Finance, Blackbaud solutions like Raiser's Edge (RE & RE NXT), Financial Edge (FE & FE NXT), Blackbaud CRM, Sage Intacct Cloud Accounting Software and Paramount WorkPlace Enterprise and Paramount WorkPlace for GP.

In PaperSave Areas, you can explore the following areas:

- [Workflow Area](#)
- [Acquire Area](#)
- [Browse Area](#)
- [Search Area](#)
- [Configuration Area](#)

# Workflow Area

This section provides information on all the key features of PaperSave Workflow Area. It educates you on how to get started with the Workflow Area and explore various the various features and functionalities offered within the area.

## Introduction to the Workflow Area

Electronic and scanned documents such as Orders, Invoices, Contracts, etc. need to traverse through different stakeholders based on the predefined business processes in organizations. This can be automated using Paper-Save Workflows by defining the steps and roles of various personnel involved in the process.

Workflow Area offers the following key functionalities:

- **CHOOSE A WORKFLOW** from the list to access the Workflow items.
- **ACQUIRE DOCUMENT** using below file capture options:
  - Scan using **TWAIN** compliant **scanner**.
  - Scan using **Fujitsu** fi-NX series **scanner**.
  - Scan using **Check** Scanner.
  - **Drag/drop or select the files to upload** from the file explorer.
- **VALIDATE DOCUMENTS** before you submit them to the Workflow.
  - **Annotate** the document using various tools such as highlighter, pen, arrow, line, ellipse, etc.
  - Manipulate pages using options such as **Add** pages, **Split**, **Join** and **Rotate** the pages.
  - **Review** and **edit** the **Profile fields**.
  - Access the **Unsubmitted items list**.

- **SUBMIT DOCUMENTS** to the Workflow.
- **EXPLORE** the Workflow items in the **WORKFLOW ITEM LIST** for the selected Workflow.
  - **Quick Search** for specific Workflow items using **keywords**.
  - **Sort** and **Filter** the Workflow items list to manage list display.
  - **Export** the list of Workflow items to **Microsoft Excel**.
  - **Download** and **Share** Workflow items **via email**.
  - Apply **Group by and Subtotal** to the list of items.
  - **Mass Update fields** for the list of Workflow items
  - **Resolve Corrupted items** in the Workflow item list.
- **RAISE WORKFLOW EVENTS** to approve or reject the Workflow items or execute any other custom event.
- **VIEW DOCUMENTS** in the Item viewer.

The following topics will help you explore the detailed features associated with each step in the Workflow Area:

- [Getting Started with PaperSave Workflow Area](#)
- [Choosing a Workflow](#)
- [Exploring Workflow item List](#)
- [Adding documents to PaperSave Workflow Area](#)
- [Validating documents in PaperSave Workflow Area](#)
- [Submitting documents to PaperSave Workflow Area](#)
- [Viewing documents in PaperSave Workflow Area](#)

## Getting Started with the Workflow Area

This guide contains details of all the functions and uses of the Workflow Area. It is organized into sections that deeply describe options available around each major function in the Workflow Area.

The best place to start learning is by going through the Quick Walkthrough of the Workflow Area and watching all of the “how-to” video tutorials presented for each step in the Workflow.

Before you start using the Workflow Area, you need to [design Workflows in PaperSave Configure Area](#). Once all the required Workflows are created and necessary configurations are done in Configure Area, then you are ready to utilize Workflow area to add, validate, submit, and view Workflow documents.

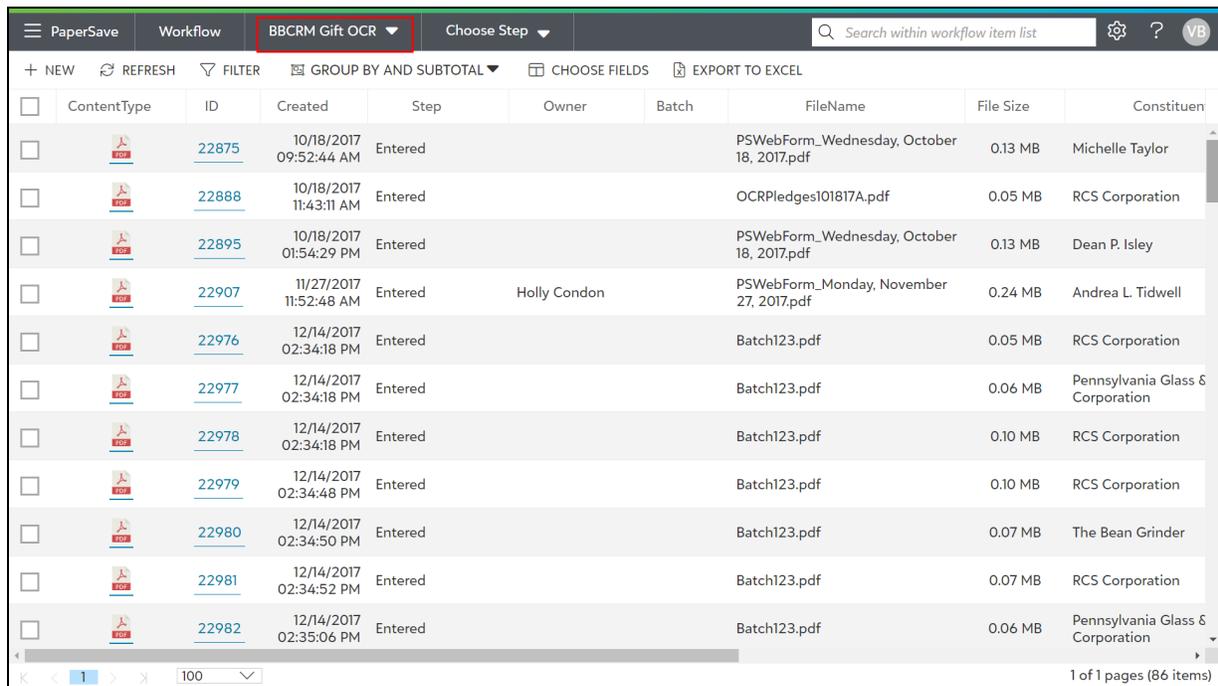
To access and manage Workflow, go to the **Navigation Area** and click on the **Workflow**.

You can learn more about getting started with the Workflow Area in the [video](#).

## Choosing a Workflow

The first step to begin with Workflow Area is to choose a Workflow from the available list of Workflows.

1) Click on the **"Choose Workflow"** dropdown in the application bar, as shown in the below screen.



The screenshot shows the application interface with the 'Choose Workflow' dropdown menu open. The dropdown menu is highlighted with a red box and contains the text 'BBCRM Gift OCR'. The main table below the dropdown lists various workflow items with columns for Content Type, ID, Created, Step, Owner, Batch, File Name, File Size, and Constituent.

Content Type	ID	Created	Step	Owner	Batch	File Name	File Size	Constituent
	<a href="#">22875</a>	10/18/2017 09:52:44 AM	Entered			PSWebForm_Wednesday, October 18, 2017.pdf	0.13 MB	Michelle Taylor
	<a href="#">22888</a>	10/18/2017 11:43:11 AM	Entered			OCRPledges101817A.pdf	0.05 MB	RCS Corporation
	<a href="#">22895</a>	10/18/2017 01:54:29 PM	Entered			PSWebForm_Wednesday, October 18, 2017.pdf	0.13 MB	Dean P. Isley
	<a href="#">22907</a>	11/27/2017 11:52:48 AM	Entered	Holly Condon		PSWebForm_Monday, November 27, 2017.pdf	0.24 MB	Andrea L. Tidwell
	<a href="#">22976</a>	12/14/2017 02:34:18 PM	Entered			Batch123.pdf	0.05 MB	RCS Corporation
	<a href="#">22977</a>	12/14/2017 02:34:18 PM	Entered			Batch123.pdf	0.06 MB	Pennsylvania Glass & Corporation
	<a href="#">22978</a>	12/14/2017 02:34:18 PM	Entered			Batch123.pdf	0.10 MB	RCS Corporation
	<a href="#">22979</a>	12/14/2017 02:34:48 PM	Entered			Batch123.pdf	0.10 MB	RCS Corporation
	<a href="#">22980</a>	12/14/2017 02:34:50 PM	Entered			Batch123.pdf	0.07 MB	The Bean Grinder
	<a href="#">22981</a>	12/14/2017 02:34:52 PM	Entered			Batch123.pdf	0.07 MB	RCS Corporation
	<a href="#">22982</a>	12/14/2017 02:35:06 PM	Entered			Batch123.pdf	0.06 MB	Pennsylvania Glass & Corporation

2) You will see a list of available Workflows in the dropdown. Click on the desired Workflow from the list as shown below. Also, you can optionally select the Workflow step from the **"Choose Step"** dropdown to access the Workflow items that belong to a specific Workflow step.

**Note:** The list of available Workflows will be based on each Workflow's security and the current users' permissions as defined in the Configuration Area.

The screenshot displays a software interface for managing workflows. The top navigation bar includes 'PaperSave', 'Workflow', 'BBCRM Gift OCR', and 'Choose Step'. A search bar is present with the text 'Search within workflow item list'. The main area is divided into two panels. The left panel shows a list of workflow items with columns for 'Content Type' and 'ID'. The right panel shows a detailed view of a workflow item, including a table of items with columns for 'Name', 'File Size', and 'Constituent'. A red box highlights the 'Entered' status in the workflow list.

Name	File Size	Constituent
Wednesday, October	0.13 MB	Michelle Taylor
01817A.pdf	0.05 MB	RCS Corporation
PSWebForm_Wednesday, October 18, 2017.pdf	0.13 MB	Dean P. Isley
PSWebForm_Monday, November 27, 2017.pdf	0.24 MB	Andrea L. Tidwell
Batch123.pdf	0.05 MB	RCS Corporation
Batch123.pdf	0.06 MB	Pennsylvania Glass & Corporation
Batch123.pdf	0.10 MB	RCS Corporation
Batch123.pdf	0.10 MB	RCS Corporation
Batch123.pdf	0.07 MB	The Bean Grinder
Batch123.pdf	0.07 MB	RCS Corporation
Batch123.pdf	0.06 MB	Pennsylvania Glass & Corporation

3) Once you have selected your Workflow and/or step, you will see all the related Workflow Items in the Workflow item list, as shown in the below screen.

**Tip:** Remember, you can enable/disable the options to 'Only see items where you are the owner' and 'Hide completed items' from the settings panel.

PaperSave Workflow BBCRM Gift OCR Entered									
Search within workflow item list									
+ NEW REFRESH FILTER GROUP BY AND SUBTOTAL CHOOSE FIELDS EXPORT TO EXCEL									
<input type="checkbox"/>	ContentType	ID	Created	Step	Owner	Batch	FileName	File Size	Constituent
<input type="checkbox"/>		<a href="#">22875</a>	10/18/2017 09:52:44 AM	Entered			PSWebForm_Wednesday, October 18, 2017.pdf	0.13 MB	Michelle Taylor
<input type="checkbox"/>		<a href="#">22888</a>	10/18/2017 11:43:11 AM	Entered			OCRPledges101817A.pdf	0.05 MB	RCS Corporation
<input type="checkbox"/>		<a href="#">22895</a>	10/18/2017 01:54:29 PM	Entered			PSWebForm_Wednesday, October 18, 2017.pdf	0.13 MB	Dean P. Isley
<input type="checkbox"/>		<a href="#">22907</a>	11/27/2017 11:52:48 AM	Entered	Holly Condon		PSWebForm_Monday, November 27, 2017.pdf	0.24 MB	Andrea L. Tidwell
<input type="checkbox"/>		<a href="#">22976</a>	12/14/2017 02:34:18 PM	Entered			Batch123.pdf	0.05 MB	RCS Corporation
<input type="checkbox"/>		<a href="#">22977</a>	12/14/2017 02:34:18 PM	Entered			Batch123.pdf	0.06 MB	Pennsylvania Glass & Paint Corporation
<input type="checkbox"/>		<a href="#">22978</a>	12/14/2017 02:34:18 PM	Entered			Batch123.pdf	0.10 MB	RCS Corporation
<input type="checkbox"/>		<a href="#">22979</a>	12/14/2017 02:34:48 PM	Entered			Batch123.pdf	0.10 MB	RCS Corporation
<input type="checkbox"/>		<a href="#">22980</a>	12/14/2017 02:34:50 PM	Entered			Batch123.pdf	0.07 MB	The Bean Grinder
<input type="checkbox"/>		<a href="#">22981</a>	12/14/2017 02:34:52 PM	Entered			Batch123.pdf	0.07 MB	RCS Corporation
<input type="checkbox"/>		<a href="#">22982</a>	12/14/2017 02:35:06 PM	Entered			Batch123.pdf	0.06 MB	Pennsylvania Glass & Paint Corporation

1 of 1 pages (55 items)

Workflow items will be displayed in the list only if any of the below conditions are met:

- The current user has rights to view items that they do not own for a specific Workflow(s).
- The current user is a Workflow Super Admin.
- The current user is the owner of an item in the Workflow.

**Tip:** User Permissions for all the Workflows can be managed in the Configuration Area.

**Note:** The Workflow items list will be loaded in the Workflow list based on the last accessed Workflow upon subsequent log in. For Example, suppose you accessed **Workflow\_A** before exiting the Workflow Area last time. In that case, the Workflow items for **Workflow\_A** will be loaded the next time you log into the Workflow Area.

## Exploring the Workflow item list

The Workflow item list is the first view you see when you open the Workflow Area. Once you have selected a Workflow and Step, the related items will be displayed in a grid (list) format with various options allowing you to manage the items in the list.

Workflow items will be displayed in the list only if any of the below conditions are met:

- The current user has rights to view items that they do not own for a specific Workflow(s).
- The current user is a Workflow Super Admin.
- The current user is the owner of an item in the Workflow.

Watch the [video](#) to learn about the Workflow item list and related toolbars.

The Workflow item list offers various options and toolbars, as shown in the below screen.

The screenshot shows a web interface for a workflow item list. At the top is the 'Application bar' containing navigation options like 'PaperSave', 'Workflow', and 'Entered', along with a search bar and user profile 'VB'. Below this is the 'List Toolbar' with actions like '+ NEW', 'REFRESH', 'FILTER', 'GROUP BY AND SUBTOTAL', 'CHOOSE FIELDS', and 'EXPORT TO EXCEL'. The main area is a table of workflow items, with the first row highlighted. At the bottom, a 'Slide up' button is visible next to the page indicator '1 of 1 pages (55 items)'. A footer bar contains various utility icons like 'PRINT', 'SHARE', 'DOWNLOAD', 'DELETE', 'REDIRECT', 'MASS UPDATE FIELDS', 'VERSIONING', and 'CREATE REVENUE'.

Content Type	ID	Created	Step	Owner	Batch	FileName	File Size	Constituent
<input checked="" type="checkbox"/>	<a href="#">22875</a>	10/18/2017 09:52:44 AM	Entered			PSWebForm_Wednesday, October 18, 2017.pdf	0.13 MB	Michelle Taylor
<input type="checkbox"/>	<a href="#">22888</a>	10/18/2017 11:43:11 AM	Entered			OCRPledges101817A.pdf	0.05 MB	RCS Corporation
<input type="checkbox"/>	<a href="#">22895</a>	10/18/2017 01:54:29 PM	Entered			PSWebForm_Wednesday, October 18, 2017.pdf	0.13 MB	Dean P. Isley
<input type="checkbox"/>	<a href="#">22907</a>	11/27/2017 11:52:48 AM	Entered	Holly Condon		PSWebForm_Monday, November 27, 2017.pdf	0.24 MB	Andrea L. Tidwell
<input type="checkbox"/>	<a href="#">22976</a>	12/14/2017 02:34:18 PM	Entered			Batch123.pdf	0.05 MB	RCS Corporation
<input type="checkbox"/>	<a href="#">22977</a>	12/14/2017 02:34:18 PM	Entered			Batch123.pdf	0.06 MB	Pennsylvania Glass & Paint Corporation
<input type="checkbox"/>	<a href="#">22978</a>	12/14/2017 02:34:18 PM	Entered			Batch123.pdf	0.10 MB	RCS Corporation
<input type="checkbox"/>	<a href="#">22979</a>	12/14/2017 02:34:48 PM	Entered			Batch123.pdf	0.10 MB	RCS Corporation
<input type="checkbox"/>	<a href="#">22980</a>	12/14/2017 02:34:50 PM	Entered			Batch123.pdf	0.07 MB	The Bean Grinder
<input type="checkbox"/>	<a href="#">22981</a>	12/14/2017 02:34:52 PM	Entered			Batch123.pdf	0.07 MB	RCS Corporation

The following is the description of each section in the Workflow item list page:

1) **Application bar:** You can navigate to various PaperSave areas, choose the desired Workflow, Quick search for specific item(s), manage user preferences in the Settings panel, access the Help menu, Feedback menu and User Profile. Click [here](#) for more details on the Application bar.

2) **List toolbar:** The Workflow item list toolbar offers various options such as +New, Refresh, Filter, Group by and Subtotal, Choose Fields, and Export to Excel to manage the Workflow items. Click [here](#) for more details about these options.

3) **Workflow item list:** Below the list toolbar, you will see a list of the Workflow items based on the selected workflow/step. Click [here](#) for more details about Workflow item list and the operations that can be performed on it.

4) **Slide up toolbar**: When you select one or more items from the list, the slide up toolbar will appear at the bottom of the screen which comprises of various options such as Print, share via Email, Download, Delete, Redirect etc. Click [here](#) for more details.

5) **Slide up event panel**: When you select one or more items in the same step, you will see the slide up event panel at the bottom of the screen with the option to raise an event such as Approve, Reject or any other custom event, and add a comment. Click [here](#) for more details.

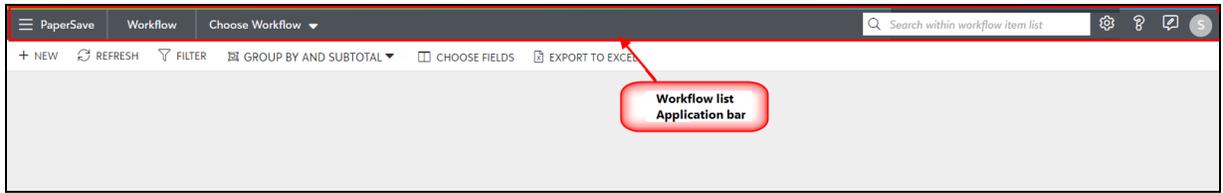
6) **Status bar**: The status bar displays information about the list such as Page number, Page size, Filter applied (if relevant), Clear filter option (if relevant), Total Items, etc. Click [here](#) for more details.

The following are the topics covered in this section:

- [Application bar in Workflow item list](#)
- [List toolbar in Workflow item list](#)
- [Workflow item list in Workflow item list](#)
- [Slide up panel in Workflow item list](#)
- [Slide up event panel in Workflow item list](#)
- [Status bar in Workflow item list](#)

## Application bar in Workflow item list

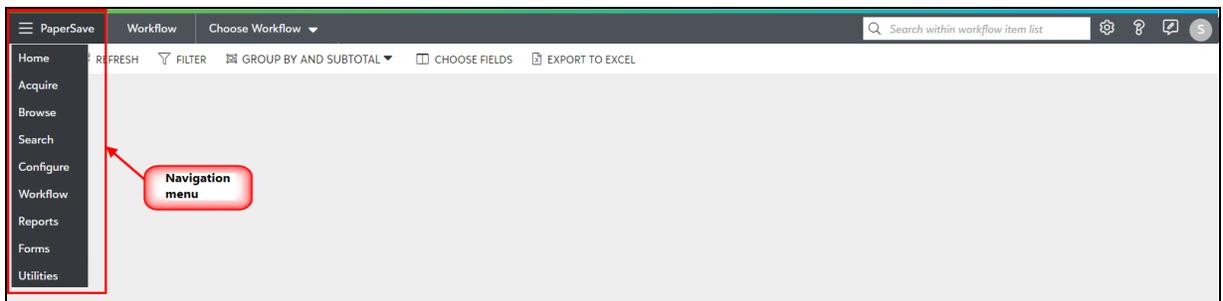
The Workflow Area presents an Application bar in the Workflow item list, as shown in the below image.



The following is the description of each option in the Application bar:

## 1) Navigation Menu

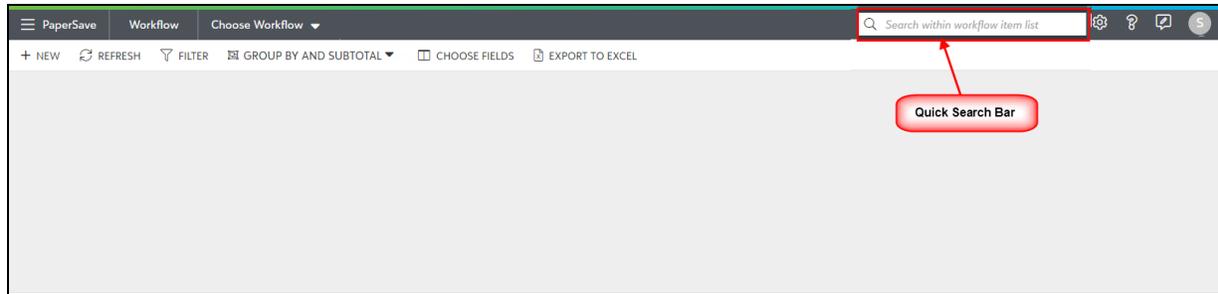
You can navigate to Home and other PaperSave Areas such as Acquire, Browse, Search, Configuration, Workflow, Reports, Forms, and Utilities. Click on the  icon in top-left corner of the screen, and select the module that you need to access as shown below:



## 2) Quick Search

You can promptly find a Workflow item from the list of Workflow items by entering relevant keywords in the Quick Search. This helps you reduce browsing and scrolling down the Workflow list in case of disproportionate number of Workflow items.

**Tip:** Enter the keywords in Quick Search, and click on the **Search** icon or press **Enter** to find the desired Workflow item from the list, as shown in the below image.



**Note:** Quick Search mechanism is case insensitive and also supports various special characters in the search criteria as follows:

**Supported Special characters:**

o ~ ` ! @ # \$ % ^ & \* ( ) \_ - + = { } | [ ] \ ; : " ' < > ? , . /

**Supported Spanish characters:**

o á, é, í, ó, ú, ñ, ü, ç, j

**Supported French characters:**

o è, ï, ü, à, è, ù, â, ê, î, ô, û, é, Ç

### 3) Settings

Click on  icon in the top right corner of application bar to define Workflow and User specific preferences, as shown in the below image.

PaperSave Workflow Choose Workflow

Search within workflow item list

+ NEW REFRESH FILTER GROUP BY AND SUBTOTAL CHOOSE FIELDS EXPORT TO EXCEL

**Workflow Settings**

**Only see items where I am the owner**  
Only show workflow items that are owned by the current user

**Hide Completed Items**  
Hide the Workflow Items which are in the Completed step of the Workflow

[View and resolve corrupted items](#)  
Use this view to see items that are stuck in this workflow's initial step, don't have a step set, or don't have an owner and are not in a step that allows for that. Basically this helps you resolve (by redirecting) the invalid state of corrupted workflow items.

**Use the new Workflow app by default**  
Turning this on will automatically redirect users who open the PaperSave Workflow windows and web app in PaperSave 6 to the new desktop web Workflow user experience.

**User Settings**

**Preferred eMail Notification Style**  
Type of eMail notifications i.e. per item, in group or both  
Both

**Out of Office**  
Use this to drive when you are in office or out of office

**Date Format**  
Default date format for PaperSave date displays  
yyyy-MM-dd

[Manage Field Templates](#)  
Use this option to modify the field templates for the related document type or workflow.

**Show Quick Walkthroughs Tab**  
Use this option to show/hide the Quick Walkthroughs tab. Turning off this setting will hide the tab.

Settings

Watch the [video](#) to learn about the Settings panel in the Workflow Item list.

The following is the description of various options in the Settings panel.

#### a) **WORKFLOW SETTINGS**

You can define various Workflow related preferences in this section as explained below:

- **Only see the items where I am the owner:** This option enables you to view the items in the Workflow that specifically belongs to the current user. Toggle the switch to enable/disable this option. You can see the nuances of enabling or disabling this option in the below table:

<b>“Only see items where I am the owner” in Settings</b>	<b>Current User is</b>	<b>Can view Workflow Items?</b>
On	Owner of the Workflow Items	Yes
On	Has right to view items that they do not own	No

<b>“Only see items where I am the owner” in Settings</b>	<b>Current User is</b>	<b>Can view Workflow Items?</b>
On	Workflow Administrator	No
On	Workflow Super User	No
Off	Owner of the Workflow Items	Yes
Off	Has right to view items that they do not own	Yes
Off	Workflow Administrator	Yes
Off	Workflow Super User	Yes

**Note:** The current user must have the Workflow access rights **“Groups/Users that can view items in the workflow that they do not own”** to view the items that they do not own.

- **Hide Completed Items:** This option enables you to hide the Workflow items that belong to the completed step in the Workflow. Toggle the switch to enable/disable this option.

<b>“Hide completed items” in Settings</b>	<b>Current User is</b>	<b>Can view Workflow Items in Completed step?</b>
On	Owner of the Workflow Items in completed step	No
On	Has right to view items that they do not own	No
On	Workflow Administrator	No
On	Workflow Super User	No
On	Has right to view items that are in Completed Step	No
Off	Owner of the Workflow Items in Completed Step	Yes
Off	Has right to view items that they do not own	No
Off	Workflow Administrator	Yes
Off	Workflow Super User	Yes
Off	Has right to view items that are in Completed Step	Yes

**Note:** Only Workflow Administrator or Workflow Super Admin have the Workflow access rights "**Groups/Users who can view into the completed step in the workflow**" to view the completed items and resolve the corrupted workflow items.

- **View and resolve corrupted items:** This option allows you to resolve those Workflow items (**Corrupted**) that may stuck in an initial or invalid step of the workflow, errored, or without a current owner by updating as needed

Watch the [video](#) to learn how to use "View and resolve corrupted items" feature.

- When you click on **View and resolve corrupted items** option from the settings panel, it will redirect you to the page with a list of corrupted item(s).

**Note:** "View and resolve corrupted items" option will be enabled in the settings panel only when there is any corrupted Workflow item in the list.

The screenshot displays the PaperSave Workflow application interface. The main area shows a table of workflow items with columns for ID, Created, Step, Batch, FileName, Vendor, and Invoice Number. The right-hand side features a settings panel with various options, including 'View and resolve corrupted items', which is highlighted with a red box. Below is a table of the workflow items shown in the interface:

ID	Created	Step	Batch	FileName	Vendor	Invoice Number
633821	2019-11-07 08:12:35 AM	Rejected	35453	blondd 752190.tif	1079	121
633825	2019-11-07 08:53:44 AM	Entered	322	3 - Copy.pdf	CareerTrack	12212
633827	2019-11-07 09:05:40 AM	Review	3545356153+	blondd 752190.pdf	Mike Nelson	1212212
633832	2019-11-08 02:57:09 AM	Review	3223	AMBIUS_026228FR377320_02-01-2016_5417.18.pdf	abc	3223
633833	2019-11-08 03:08:46 AM	Data Entry	1911081338	1 - Copy (2).pdf	wert	1212
633834	2019-11-08 03:29:42 AM	Initial	caafdsfdf	3 - Copy.pdf	Flow vendor 5	012121
633836	2019-11-08 06:27:11 AM	Rejected	helloo	bb file.tif	CareerTrack	633836aa
633837	2019-11-08 07:09:13 AM	Data Entry	1911081739	bb file.tif	Southern Utilities	1212
633838	2019-11-08 07:19:47 AM	Data Entry	1911081749	bb file.tif	Charleston County Treasurer	21121
633839	2019-11-08 07:28:14 AM	Entered	i212	90 MINUTE_208012_02-01-2016_5167.53.pdf	CareerTrack	12212
1059936	2020-06-02 09:39:05 AM	Review	i5356	Attractive Telephone Company 15500.00.pdf	Attractive Telephone Company	02468
1181241	2020-03-29	Review	pam 3-29	BLUE LAGOON 525.pdf	1202	43052

- Once you are redirected to the list of Corrupted items, select one or more item(s) from the list and click on **FIX** to start resolving the corrupted item(s).

BB Integration Workflow - Corrupted Items													
REFRESH EXPORT TO EXCEL													
✓	ID	Created	Step	Owner	Vendor	Invoice Number	Invoice Amount	Invoice Date	Invoice Description	GLDistribution	Remit To ID	DueDate	PostDate
✓	633834	2019-11-08 03:29:42 AM	Initial		Flow vendor 5	012121	\$55.00	2019-11-05	das		2071	2014-10-28	2014-11-18

OPEN    PRINT    DOWNLOAD    DELETE    UPDATE FIELDS    FIX

1 of 1 pages (1 items)

○ You can fix the corrupted Workflow item(s) by using any of the following options:

- **Change Step:** When the Workflow item(s) are in **initial** step.

**Tip:** "Change step" also allows you to select an owner, which helps if both fields are blank.

- **Change Owner:** When the Workflow item(s) do not have any owner.

Select method to fix selected items: ✕

Change Step

Change Owner

- **Use the new Workflow App by default**

Turn ON this option to be redirected to the PaperSave 7 Workflow experience when accessing the PaperSave 6 Workflow.

## b) USER SETTINGS

You can define various Workflow user related preferences in this section.

- **Preferred eMail Notification Style:** You can set the frequency of email notifications related to Workflow items by using any of the following options. Click [here](#) to know more about eMail Notification Style.
  - **Per Item:** You will receive one email notification per Workflow item that belongs to a Workflow step where current user is the owner.
  - **In Group:** You will receive an email notification with the list of all the Items in a Workflow step where the current user is the owner. The frequency and the time of the email can be set in the Configuration Area.
  - **Both:** You will receive emails "Per Item" and in "Group".
- **Out of Office:** This option enables you to define when you are in the office or out of the office. You can set the following options when you are out of the office.
  - **Will be out of office Until: Date** of returning to office.
  - **While away forward my items to:** The **User** who will receive your Workflow items while you are out of office.
  - **Out of Office Message:** Out of office **message** to be sent to the user assigned to your Workflow items.
- **Date format:** This option enables you to set the desired date format for date display in this app. By default, it is MM/dd/yyyy.

You can find below options to select the preferred date format from the below available options:

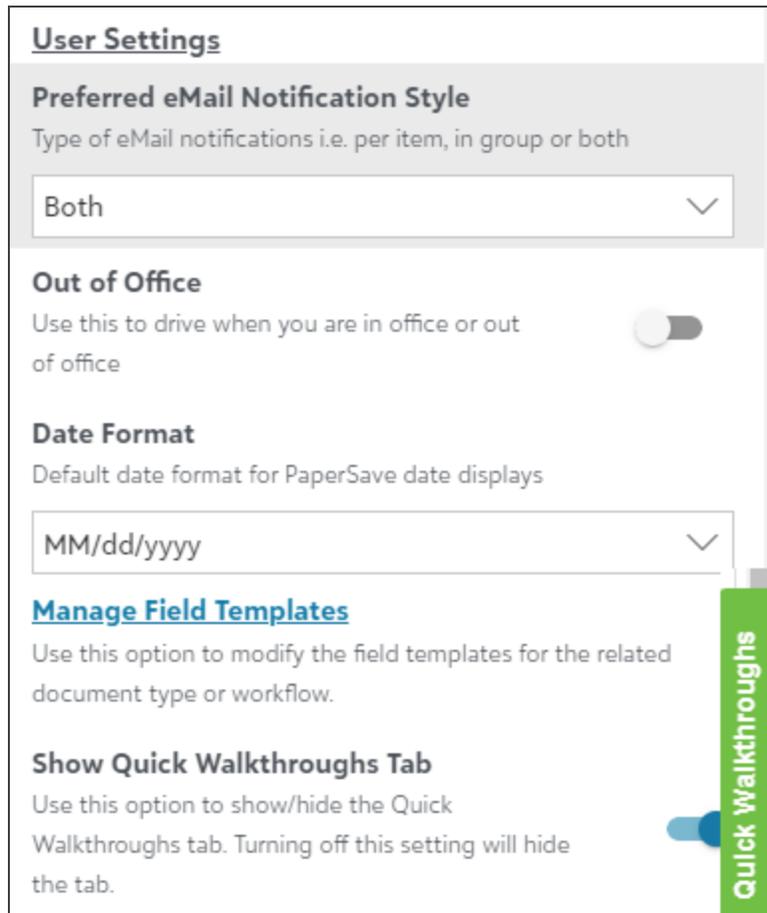
- MM-dd-yyyy
- MM/dd/yyyy
- dd-MM-yyyy
- dd/MM/yyyy
- yyyy-MM-dd

- **Manage Field Template:** Click on this option to add, edit, or delete existing field templates for the current workflow and related document type.

Watch the [video](#) to learn how to manage existing field templates.

- **Show Quick Walkthroughs Tab:** You can enable/disable this option to show/hide the **Quick Walkthrough** tab. This option will be **ON** by default and you will see the Quick Walkthrough tab.

**Tip:** The green Quick Walkthroughs tab can be moved by dragging with your mouse.



#### 4) **Feedback**

You can give your feedback or view other's suggestion for the current PaperSave page.

#### 5) **Help**

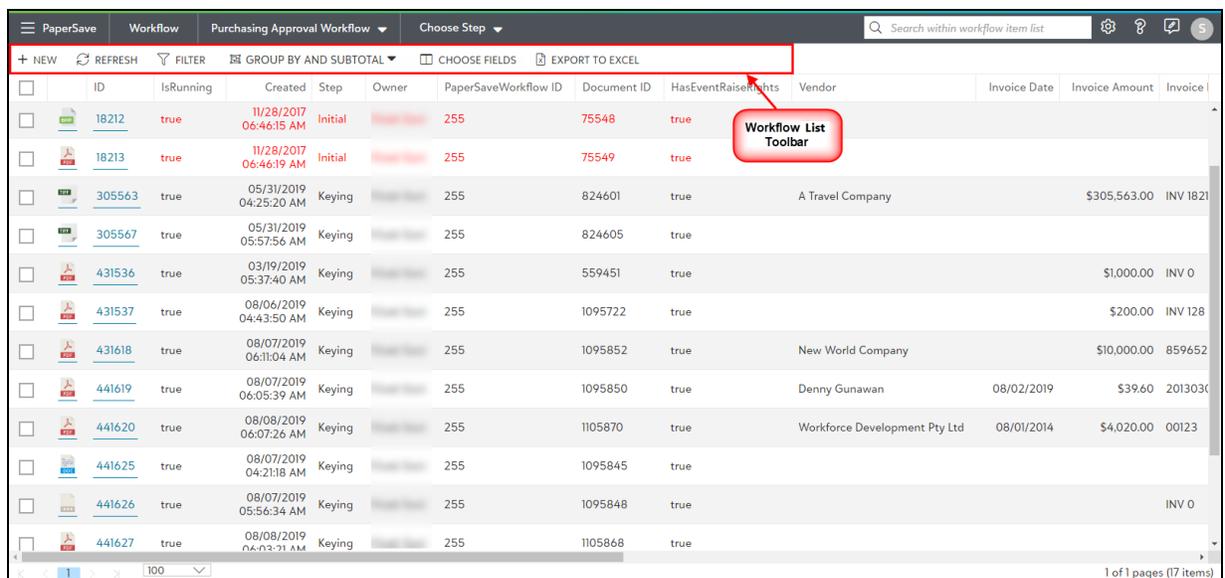
Click on the **? Help** icon for quick access to information about your PaperSave environment, the User Guide, Knowledge base articles, and the Customer portal. Click [here](#) for more details about the ? Help menu options.

## 6) User Profile

You can access the current user related information in User Profile. Click [here](#) for more details.

## List toolbar options in Workflow item list

The list toolbar in the Workflow item list offers several options, as shown in the below screen.



ID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaised	Vendor	Invoice Date	Invoice Amount	Invoice
<a href="#">18212</a>	true	11/28/2017 06:46:15 AM	Initial		255	75548	true				
<a href="#">18213</a>	true	11/28/2017 06:46:19 AM	Initial		255	75549	true				
<a href="#">305563</a>	true	05/31/2019 04:25:20 AM	Keying		255	824601	true	A Travel Company		\$305,563.00	INV 1821
<a href="#">305567</a>	true	05/31/2019 05:57:56 AM	Keying		255	824605	true				
<a href="#">431536</a>	true	03/19/2019 05:37:40 AM	Keying		255	559451	true			\$1,000.00	INV 0
<a href="#">431537</a>	true	08/06/2019 04:43:50 AM	Keying		255	1095722	true			\$200.00	INV 128
<a href="#">431618</a>	true	08/07/2019 06:11:04 AM	Keying		255	1095852	true	New World Company		\$10,000.00	859652
<a href="#">441619</a>	true	08/07/2019 06:05:39 AM	Keying		255	1095850	true	Denny Gunawan	08/02/2019	\$39.60	2013030
<a href="#">441620</a>	true	08/08/2019 06:07:26 AM	Keying		255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020.00	00123
<a href="#">441625</a>	true	08/07/2019 04:21:18 AM	Keying		255	1095845	true				
<a href="#">441626</a>	true	08/07/2019 05:56:34 AM	Keying		255	1095848	true				INV 0
<a href="#">441627</a>	true	08/08/2019 06:02:21 AM	Keying		255	1105868	true				

The following is the description of options available in the Workflow item list toolbar:

- **+NEW:** This option primarily enables you to add documents to a selected Workflow. When you click on **+New**, you will be redirected to the 'File Capture' options panel where you can acquire documents for the selected Workflow using any of the available methods such as "Scan using a **Fujitsu fi-NX series scanner**", "Scan using a **TWAIN-compliant scanner**", Scan using a **Check scanner** or "**Drag items or select the files to upload from file explorer**". Click [here](#) to know more about acquiring a document.

PaperSave Workflow Purchasing Approval Workflow Choose Step												
Search within workflow item list												
+ NEW REFRESH FILTER GROUP BY AND SUBTOTAL CHOOSE FIELDS EXPORT TO EXCEL												
ID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount	Invoice I	
18212	true	11/28/2017 06:46:15 AM	Initial		255	75548	true					
18213	true	11/28/2017 06:46:19 AM	Initial		255	75549	true					
305563	true	05/31/2019 04:25:20 AM	Keying		255	824601	true	A Travel Company		\$305,563.00	INV 1821	
305567	true	05/31/2019 05:57:56 AM	Keying		255	824605	true					
431536	true	03/19/2019 05:37:40 AM	Keying		255	559451	true			\$1,000.00	INV 0	
431537	true	08/06/2019 04:43:50 AM	Keying		255	1095722	true			\$200.00	INV 128	
431618	true	08/07/2019 06:11:04 AM	Keying		255	1095852	true	New World Company		\$10,000.00	859652	
441619	true	08/07/2019 06:05:39 AM	Keying		255	1095850	true	Denny Gunawan	08/02/2019	\$39.60	2013030	
441620	true	08/08/2019 06:07:26 AM	Keying		255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020.00	00123	
441625	true	08/07/2019 04:21:18 AM	Keying		255	1095845	true					
441626	true	08/07/2019 05:56:34 AM	Keying		255	1095848	true				INV 0	
441627	true	08/08/2019 06:03:31 AM	Keying		255	1105868	true					

- **REFRESH:** This option updates the recent changes in the Workflow Item list.

PaperSave Workflow Purchasing Approval Workflow Choose Step												
Search within workflow item list												
+ NEW REFRESH FILTER GROUP BY AND SUBTOTAL CHOOSE FIELDS EXPORT TO EXCEL												
ID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount	Invoice I	
18212	true	11/28/2017 06:46:15 AM	Initial		255	75548	true					
18213	true	11/28/2017 06:46:19 AM	Initial		255	75549	true					
305563	true	05/31/2019 04:25:20 AM	Keying		255	824601	true	A Travel Company		\$305,563.00	INV 1821	
305567	true	05/31/2019 05:57:56 AM	Keying		255	824605	true					
431536	true	03/19/2019 05:37:40 AM	Keying		255	559451	true			\$1,000.00	INV 0	
431537	true	08/06/2019 04:43:50 AM	Keying		255	1095722	true			\$200.00	INV 128	
431618	true	08/07/2019 06:11:04 AM	Keying		255	1095852	true	New World Company		\$10,000.00	859652	
441619	true	08/07/2019 06:05:39 AM	Keying		255	1095850	true	Denny Gunawan	08/02/2019	\$39.60	2013030	
441620	true	08/08/2019 06:07:26 AM	Keying		255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020.00	00123	
441625	true	08/07/2019 04:21:18 AM	Keying		255	1095845	true					
441626	true	08/07/2019 05:56:34 AM	Keying		255	1095848	true				INV 0	
441627	true	08/08/2019 06:03:31 AM	Keying		255	1105868	true					

- **FILTER:** You can narrow down the items in the list by applying filter conditions on the column header. Learn more about [Filter](#).

- **GROUP BY AND SUBTOTAL:** Suppose you want to subtotal the items in the list by a specific Workflow Step or Invoice Date or another field. In that case, this option allows you to create a definition that can be saved and applied later. So by using Group By and Subtotal, you can cluster the items in the list based on the desired header fields and get the summation for the number type field. Learn more about [Group by and Subtotal](#).
- **CHOOSE FIELDS:** You can set desired preferences to manage what information to be displayed in the current list by adding or removing columns using Choose Fields. Learn more about [Choose Fields](#).
- **EXPORT TO EXCEL:** This option is useful when you want to share data with users outside of the system, such as an audit. This option will export the list of Invoice items to a Microsoft Excel file (based on columns in the display) with a hyperlink to view the items. Learn more about [Export to Excel](#).

## Workflow item list

This area presents a list of Workflow items for the selected Workflow and/or Workflow step where you can perform various operations such as:

- Interact with Workflow items using a single click to select an item, or double-click to open in the item viewer.
- Sort the Workflow items in ascending or descending order by the desired column header fields.
- Raise Workflow events such as Approve, Reject, or any other custom event.
- Manage the display using the Filter and Choose Fields options in the list toolbar.

ID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount	Invoice
18212	true	11/28/2017 06:46:15 AM	Initial	Wash Tech	255	75548	true				
18213	true	11/28/2017 06:46:19 AM	Initial	Wash Tech	255	75549	true				
305563	true	05/31/2019 04:25:20 AM	Keying	Wash Tech	255	824601	true	A Travel Company		\$305,563.00	INV 182
305567	true	05/31/2019 05:57:56 AM	Keying	Wash Tech	255	824605	true				
431536	true	03/19/2019 05:37:40 AM	Keying	Wash Tech	255	559451	true			\$1,000.00	INV 0
431537	true	08/06/2019 04:43:50 AM	Keying	Wash Tech	255	1095722	true			\$200.00	INV 128
431618	true	08/07/2019 06:11:04 AM	Keying	Wash Tech	255	1095852	true	New World Company		\$10,000.00	859652
441619	true	08/07/2019 06:05:39 AM	Keying	Wash Tech	255	1095850	true	Denny Gunawan	08/02/2019	\$39.60	2013030
441620	true	08/08/2019 06:07:26 AM	Keying	Wash Tech	255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020.00	00123
441625	true	08/07/2019 04:21:18 AM	Keying	Wash Tech	255	1095845	true				
441626	true	08/07/2019 05:56:34 AM	Keying	Wash Tech	255	1095848	true				INV 0
441627	true	08/08/2019 06:03:14 AM	Keying	Wash Tech	255	1105868	true				

## Workflow item list column headers

The Workflow item list appears with several default columns and columns based on the Workflow and Document Type fields. You can show or hide columns in the display using the **Choose Fields** option in the list toolbar.

The default fixed columns for the Workflow item list are:

- **Checkbox:** To select an item.
- **Content Type:** Icon of the file type. For Example, PDF, Tiff, Doc, etc.
- **ID:** Workflow Item ID.
- **Created On:** Date item was added to the Workflow.
- **Step:** Item's current Workflow step name.
- **Owner:** Item's current owner. It can be an individual User or Group, based on the value set in the target owner. Click [here](#) to learn more about Group ownership for Workflow Items.

**Note:** The Workflow and Document type fields will be displayed based on the Workflow and Document type field security settings.

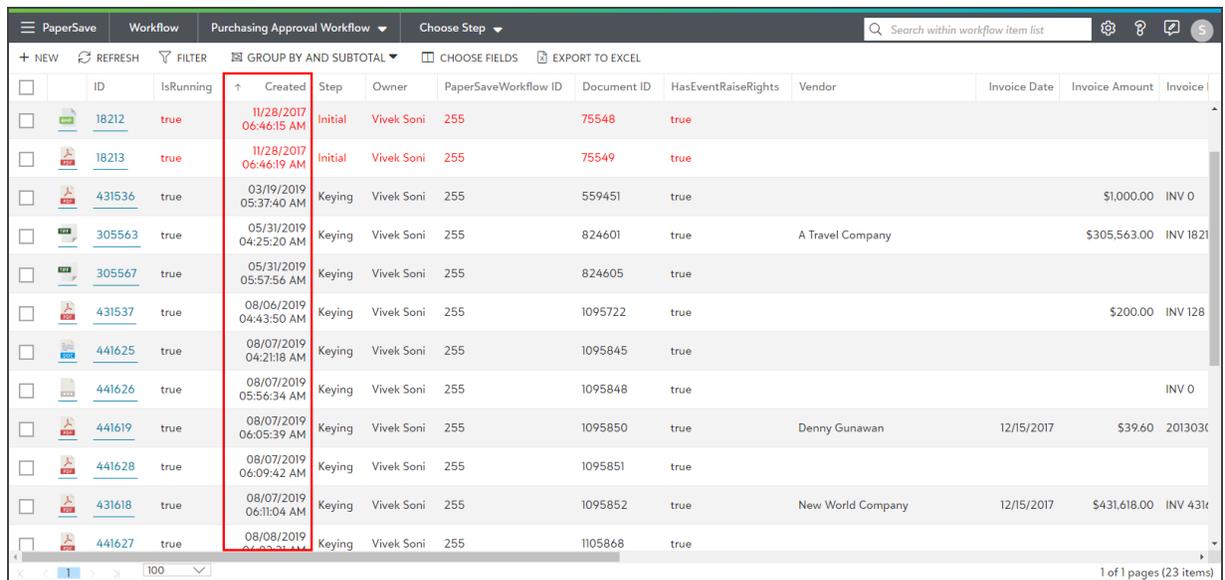
**Tip:** Workflow user permissions can be managed from PaperSave Configuration Area.

## Sorting the Workflow item list

You can sort the items in the Workflow item list by clicking on any column header to sort the item list in ascending or descending order by that field.

For instance, let's say we want to sort the Workflow item list for given Workflow in an ascending order of the **Created** column. For this, click on the **Created** column **once** to sort the Workflow list in ascending order of Workflow item ID's. Now, the column header will have an "Up" arrow sign.

**Note:** To change the sort to descending order, just click on the column header again.



	ID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount	Invoice ID
<input type="checkbox"/>	<a href="#">18212</a>	true	11/28/2017 06:46:15 AM	Initial	Vivek Soni	255	75548	true				
<input type="checkbox"/>	<a href="#">18213</a>	true	11/28/2017 06:46:19 AM	Initial	Vivek Soni	255	75549	true				
<input type="checkbox"/>	<a href="#">431536</a>	true	03/19/2019 05:37:40 AM	Keying	Vivek Soni	255	559451	true			\$1,000.00	INV 0
<input type="checkbox"/>	<a href="#">305563</a>	true	05/31/2019 04:25:20 AM	Keying	Vivek Soni	255	824601	true	A Travel Company		\$305,563.00	INV 1821
<input type="checkbox"/>	<a href="#">305567</a>	true	05/31/2019 05:57:56 AM	Keying	Vivek Soni	255	824605	true				
<input type="checkbox"/>	<a href="#">431537</a>	true	08/06/2019 04:43:50 AM	Keying	Vivek Soni	255	1095722	true			\$200.00	INV 128
<input type="checkbox"/>	<a href="#">441625</a>	true	08/07/2019 04:21:18 AM	Keying	Vivek Soni	255	1095845	true				
<input type="checkbox"/>	<a href="#">441626</a>	true	08/07/2019 05:56:34 AM	Keying	Vivek Soni	255	1095848	true				INV 0
<input type="checkbox"/>	<a href="#">441619</a>	true	08/07/2019 06:05:39 AM	Keying	Vivek Soni	255	1095850	true	Denny Gunawan	12/15/2017	\$39.60	2013030
<input type="checkbox"/>	<a href="#">441628</a>	true	08/07/2019 06:09:42 AM	Keying	Vivek Soni	255	1095851	true				
<input type="checkbox"/>	<a href="#">431618</a>	true	08/07/2019 06:11:04 AM	Keying	Vivek Soni	255	1095852	true	New World Company	12/15/2017	\$431,618.00	INV 4316
<input type="checkbox"/>	<a href="#">441627</a>	true	08/08/2019 06:09:42 AM	Keying	Vivek Soni	255	1105868	true				

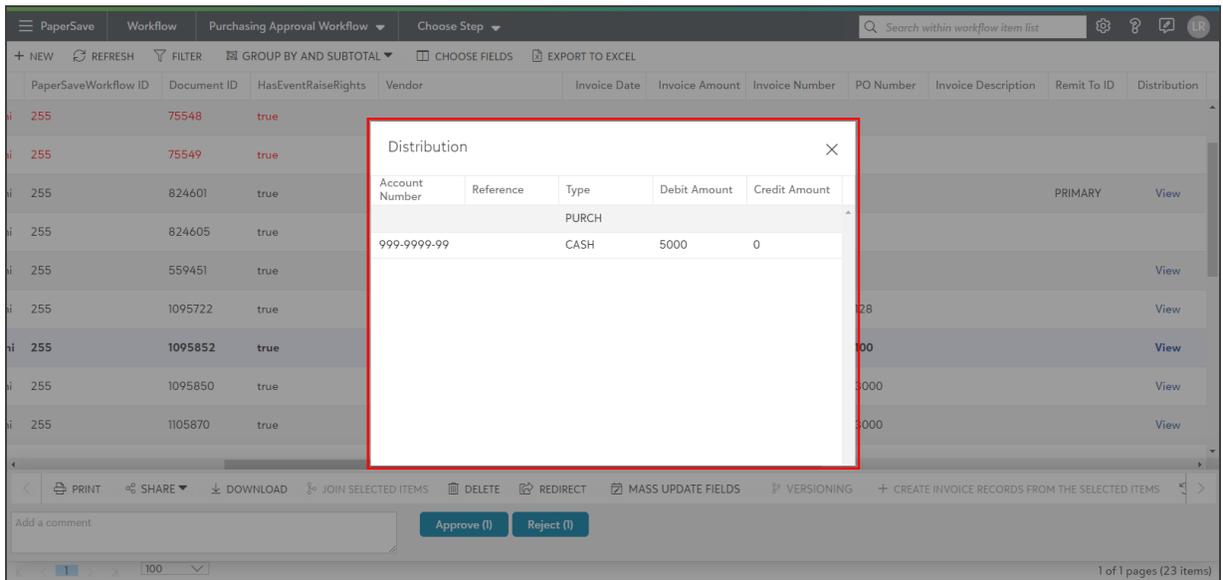
- Similarly, click on the **Created** column **one more time** to sort the Workflow list in descending order of Workflow item ID's.
- As you can see in the below figure, the Workflow item list is sorted in the descending order of column **Created**. Now, the column header will have a "down" arrow sign.

ID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount	Invoice ID
461696	true	08/09/2019 10:05:10 AM	Keying	Vivek Soni	255	1115998	true	New World Company	02/26/2010	\$200,000.00	859652
451687	true	08/09/2019 09:33:33 AM	Keying	Vivek Soni	255	1115996	true	A Travel Company	01/01/2014	\$4,020.00	00123
451688	true	08/09/2019 09:33:29 AM	Keying	Vivek Soni	255	1115993	true				
451686	true	08/09/2019 09:33:27 AM	Keying	Vivek Soni	255	1115992	true	New World Company	07/26/2019	\$20,000.00	859652
451684	true	08/09/2019 04:36:52 AM	Keying	Vivek Soni	255	1115953	true	A Travel Company			00123
461697	true	08/09/2019 04:35:56 AM	Keying	Vivek Soni	255	1115952	true	New World company	02/26/2010	\$200,000.00	859652
441632	true	08/08/2019 06:22:08 AM	Keying	Vivek Soni	255	1105879	true				
441629	true	08/08/2019 06:17:04 AM	Keying	Vivek Soni	255	1105876	true	Transport & Logistics	12/15/2017	\$4,020.00	00123
441620	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105870	true	Workforce Development Pty Ltd	12/15/2017	\$4,020.00	00123
441627	true	08/08/2019 06:03:21 AM	Keying	Vivek Soni	255	1105868	true				
431618	true	08/07/2019 06:11:04 AM	Keying	Vivek Soni	255	1095852	true	New World Company	12/15/2017	\$431,618.00	INV 431618
441628	true	08/07/2019 06:07:26 AM	Keying	Vivek Soni	255	1095851	true				

- To sort multiple columns, press **CTRL** key (from keyboard)+ click on the desired columns. When you sort multiple columns, it will automatically show the numbering in order you have selected the columns, as shown below.



- Clicking on the **View** hyperlink will display a dialog showing the values of the table type field for that specific Workflow item.



## Slide up panel in the Workflow item list

The slide-up panel is divided into 2 sections:

- 1) **Slide-up toolbar:** When you select one or more Workflow items from the list, you will see the Slide up toolbar appear at the bottom of the screen, offering various operations that can be performed on the selected items. Click [here](#) for more details about the slide-up toolbar options.
- 2) **Slide-up Workflow event panel:** You can select one or more Workflow item in the same Workflow step to raise the Workflow Event panel from the bottom of the screen. You can raise Workflow events such as Approve or Reject along with a comment box to traverse the documents. Learn more about [raising Workflow Events](#).

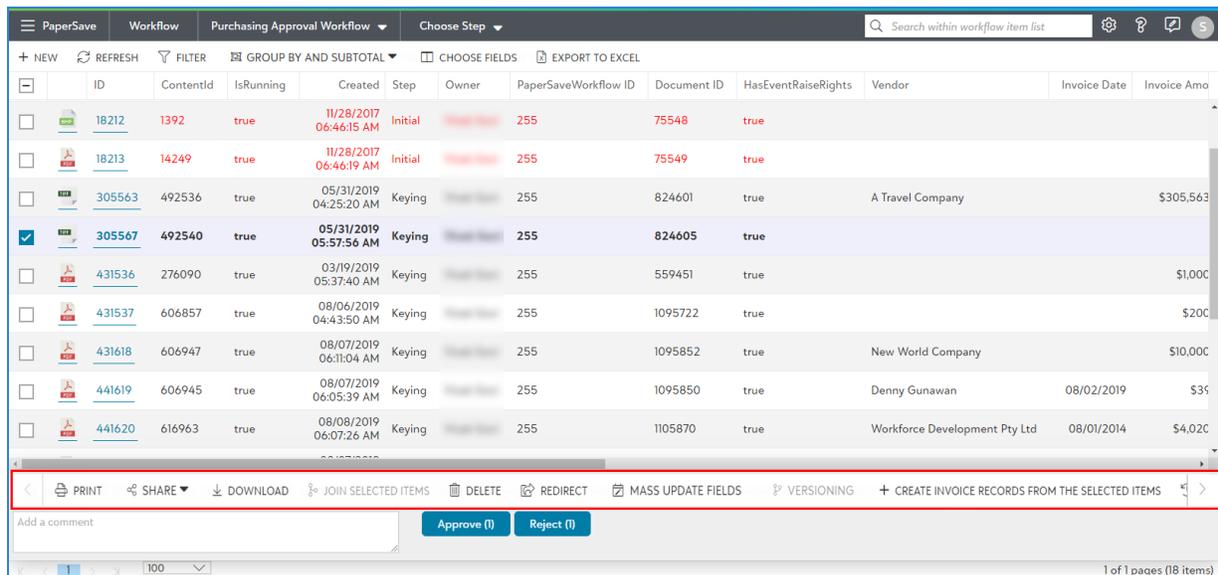
**Note:** The Workflow event panel will appear only if you are the current Workflow item's owner or are the Workflow Super Administrator.

## View a Workflow item in the embedded item viewer

You can double click on a Workflow item to open it in the embedded item viewer. Click [here](#) for more details about item viewer.

## Slide-up panel in Workflow item list

The Slide up panel offers various operations that can be performed on single or multiple Workflow items. The Slide up panel shall pop-up from the bottom of the screen upon selecting one or more Workflow items from the list as shown below.

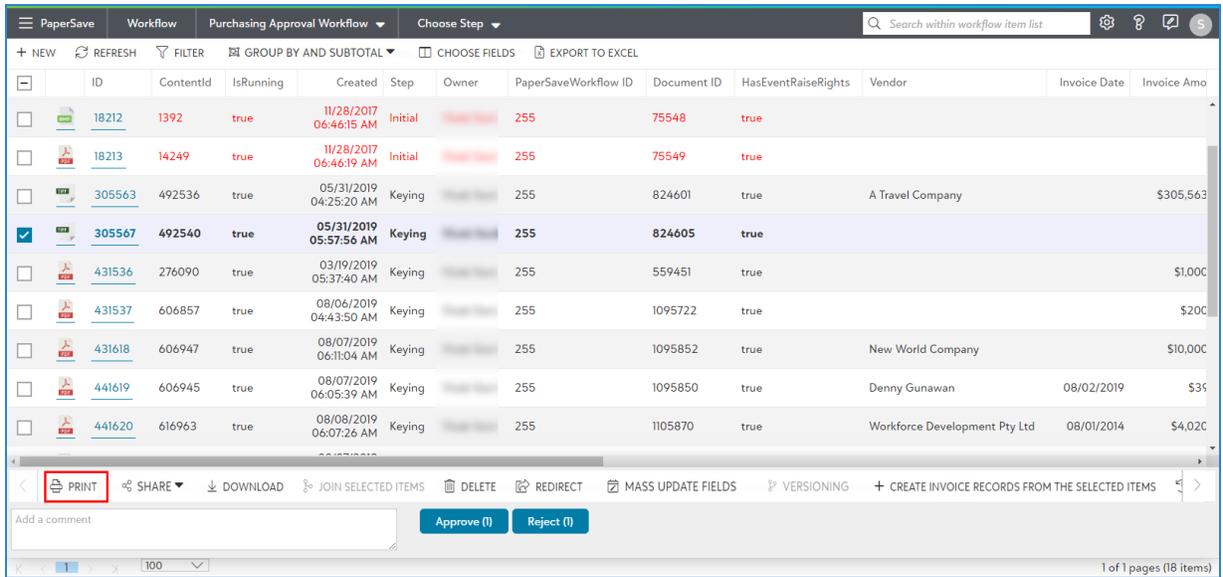


The screenshot shows a web application interface for managing workflow items. At the top, there is a navigation bar with 'PaperSave', 'Workflow', and 'Purchasing Approval Workflow' menus. Below this is a toolbar with options like '+ NEW', 'REFRESH', 'FILTER', 'GROUP BY AND SUBTOTAL', 'CHOOSE FIELDS', and 'EXPORT TO EXCEL'. A search bar is also present. The main area is a table with columns: ID, ContentId, IsRunning, Created, Step, Owner, PaperSaveWorkflow ID, Document ID, HasEventRaiseRights, Vendor, Invoice Date, and Invoice Amount. The table contains several rows of data, with the row for ID 305567 selected. At the bottom, a slide-up panel is open, showing a toolbar with options: PRINT, SHARE, DOWNLOAD, JOIN SELECTED ITEMS, DELETE, REDIRECT, MASS UPDATE FIELDS, VERSIONING, and CREATE INVOICE RECORDS FROM THE SELECTED ITEMS. Below the toolbar is a comment field and 'Approve (1)' and 'Reject (1)' buttons. The bottom status bar shows '1 of 1 pages (18 items)'.

ID	ContentId	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount
18212	1392	true	11/28/2017 06:46:15 AM	Initial		255	75548	true			
18213	14249	true	11/28/2017 06:46:19 AM	Initial		255	75549	true			
305563	492536	true	05/31/2019 04:25:20 AM	Keying		255	824601	true	A Travel Company		\$305,563
305567	492540	true	05/31/2019 05:57:56 AM	Keying		255	824605	true			
431536	276090	true	03/19/2019 05:37:40 AM	Keying		255	559451	true			\$1,000
431537	606857	true	08/06/2019 04:43:50 AM	Keying		255	1095722	true			\$200
431618	606947	true	08/07/2019 06:11:04 AM	Keying		255	1095852	true	New World Company		\$10,000
441619	606945	true	08/07/2019 06:05:39 AM	Keying		255	1095850	true	Denny Gunawan	08/02/2019	\$35
441620	616963	true	08/08/2019 06:07:26 AM	Keying		255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020

The following are the available options in the Workflow list slide up panel :

- **PRINT:** This option enables you to print the selected Workflow item from the Workflow item list.



**Note:** Print option will be only allowed if a single Workflow item is selected. In case, multiple items are selected, then the **Print** button will be disabled. This option also prints the annotations on the document, if any.

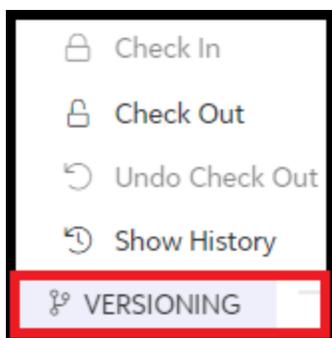
- **SHARE:** You can share the Workflow items from the list using any of the below options:
  - Share Workflow item via eMail
  - Share link of the Workflow item via eMail
  - Copy Link
- **DOWNLOAD:** You can download the selected documents from the list. Learn more about the [Download](#) option.

- **JOIN SELECTED ITEMS:** This option will be enabled when you select two or more items of the same type that are in the same step. This option is based on the current user's role and permissions as well as workflow security. Learn more about the [Join Selected Items](#) option.
- **DELETE:** You can permanently discard the unnecessary items from the current list using the DELETE option. Learn more about the [DELETE](#) option.
- **REDIRECT:** You can move the Workflow items to another Workflow or change the step or change ownership. Learn more about [Redirect](#) option.
- **MASS UPDATE FIELDS:** This option is used to create templates to define values for the Document fields. Click on the MASS UPDATE FIELDS option to choose the desired template from given list of templates.

ID	ContentID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amo
18212	1392	true	11/28/2017 06:46:15 AM	Initial		255	75548	true			
18213	14249	true	11/28/2017 06:46:19 AM	Initial		255	75549	true			
305563	492536	true	05/31/2019 04:25:20 AM	Keying		255	824601	true	A Travel Company		\$305,563
305567	492540	true	05/31/2019 05:57:56 AM	Keying		255	824605	true			
431536	276090	true	03/19/2019 05:37:40 AM	Keying		255	559451	true			\$1,000
431537	606857	true	08/06/2019 04:43:50 AM	Keying		255	1095722	true			\$200
431618	606947	true	08/07/2019 06:11:04 AM	Keying		255	1095852	true	New World Company		\$10,000
441619	606945	true	08/07/2019 06:05:39 AM	Keying		255	1095850	true	Denny Gunawan	08/02/2019	\$35
441620	616963	true	08/08/2019 06:07:26 AM	Keying		255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020

Watch the [video](#) to learn how to use Mass Update Fields to modify the field values for selected items.

- **VERSIONING:** This option is used to control the changes made in different versions of the selected document. Click on this option to see the various versioning options as shown in the below screen.



**Note:** Versioning must be enabled for the Document type in the Configuration area. Otherwise, this option will be grayed out (disabled).

**Note:** Now, if **versioning** is enabled, then a current user must have add/edit document rights on the selected Workflow and this could be managed from the Workflows tile in the Configuration Area.

The following is the description of various options available in Versioning:

- **Check In :** This option is used to save the changes made to the selected document. You can check-in only those documents that are checked-out or are checked-in for the first time after being added. Clicking **Check In** button will open a window where you need to select version type with which you would like to check-in the selected document. Versioning the documents as minor or major enables you to track the type of changes made to the document. Moreover, you can add the Version Comments in the available textbox for your reference. Then click on **OK** to check-in the document. It will display the Check-In success or failure.
- **Check Out:** This option will check-out the selected document, which will enable you to make changes to the document. You need to check-out the document to make any changes.

**Note:** This option is enabled only when the document is checked in.

- **Undo Check Out:** This option will undo all the changes made to the document after the latest check-out was made to the document and revert back to the prior version of the document.

**Note:** Note: This option is enabled only when the document is checked in.

- **Show History:** This option will display the history of check-in operations made to the selected document. You will see check in details like Version of the document, Name of the User who checked in and Last modification time. You can also view the document by clicking View. You can click on **Restore**, if you wish to revert to the selected version of the document. It will prompt for confirmation before restoring the document.

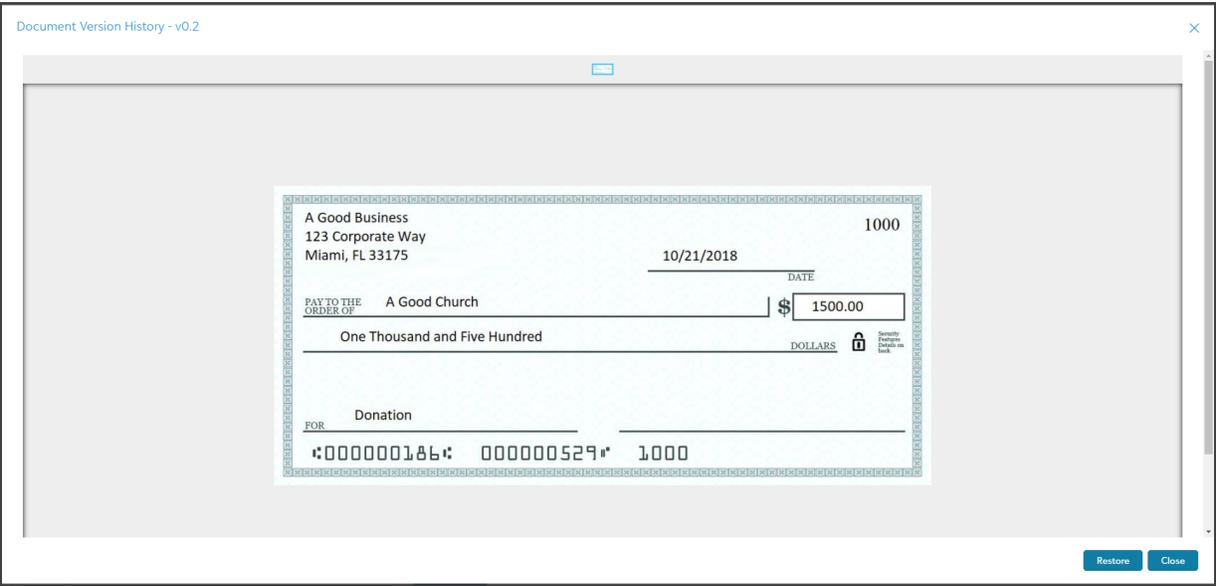
Document Version History ✕

Version	User	Time Last Modified	User Comments	Actions
0.1	PS\jsharma	2021-09-12 03:41 PM		
<b>0.2</b>	PS\jsharma	<b>2021-09-12 04:08 PM</b>	<b>changed</b>	

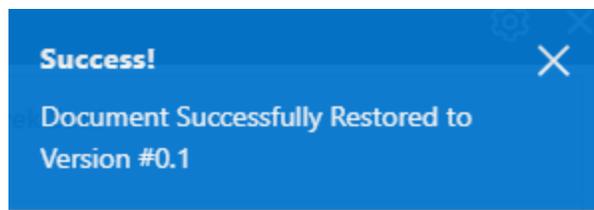
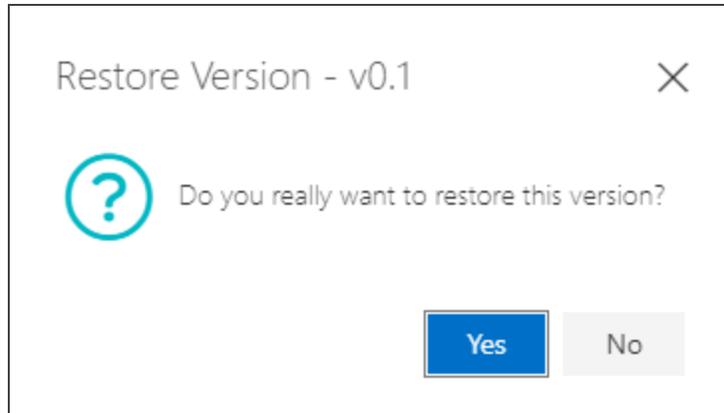
K < 1 > X 1 of 1 pages (2 items)

[Dismiss](#)

You can click on **Restore** as shown below if you wish to revert back to the selected version of the document.



It will prompt for confirmation before restoring the document. Once you click on Yes you will get the success message as shown below and failure message if restore fails.



- **+CREATE \_\_\_\_\_ RECORDS FROM THE SELECTED ITEMS:** This option will let you select multiple items to directly submit to Dynamics 365 Finance to create the respective record based on Workflow field values and associate the document.

**Tip:** The selected items must be in the same step which has the option to manually submit to Auto entry enabled.

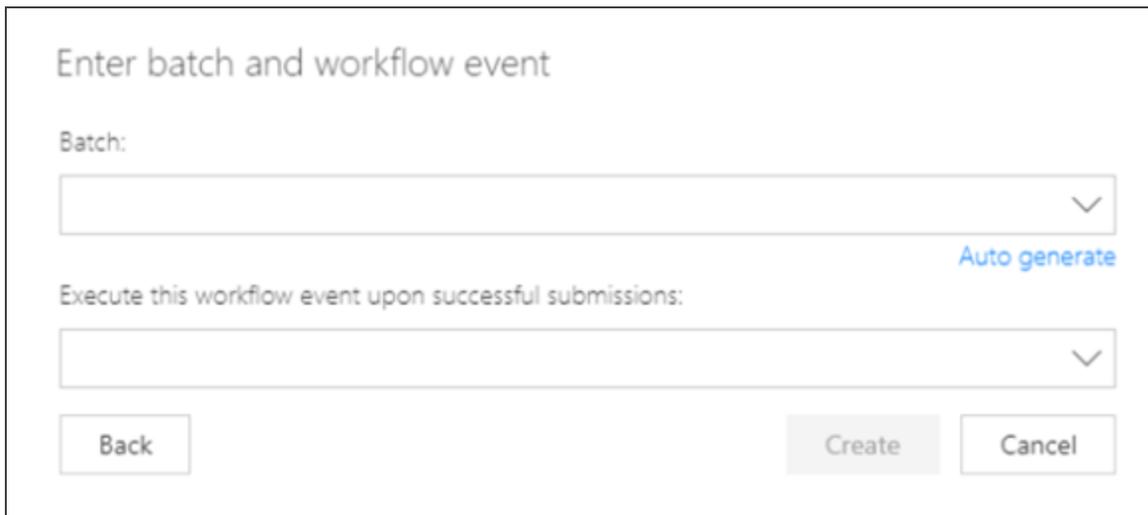


a) If you choose "Item's PaperSave acquisition batch property" option, then it will prompt you to choose the Workflow event that will be executed on successful submission, as shown below.



The screenshot shows a dialog box titled "Select workflow event". Below the title is the instruction "Execute this workflow event upon successful submissions:". There is a single dropdown menu for selecting a workflow event. At the bottom, there are three buttons: "Back" (white), "Create" (blue), and "Cancel" (white).

b) If you choose "Select a different value" option, then it will prompt you to select/generate batch and select Workflow event that will be executed on successful submission, as shown below.



The screenshot shows a dialog box titled "Enter batch and workflow event". It contains two dropdown menus. The first is labeled "Batch:" and has a blue "Auto generate" link to its right. The second dropdown menu is under the instruction "Execute this workflow event upon successful submissions:". At the bottom, there are three buttons: "Back" (white), "Create" (greyed out), and "Cancel" (white).

- **DOWNLOAD WORKFLOW ITEM HISTORY:** This option will download a file containing detailed information about the selected Workflow item as it moved from one step to another.

The downloaded file consists of details such as Previous Step, New Step, Changed By (Workflow User), Changed On, Previous Owner, Current Owner, and, Comment for all the steps of the current Workflow item as shown in the below screen.

**Workflow Item Details:**

**Workflow Name:** BHSN shipment      **ID:** 33163      **Batch:**

**File Name:**  
1 Page - 2 Butler Buckley Deets.pdf

---

**Field Details:**

**Vendor:** Associated Insurance Inc.      **Doc Type:** Invoice      **Invoice Date:** 12/12/2020  
**Date Received:** 01/13/2021      **Invoice Number:** 54574      **Comments:** test  
**PO Number:** PO2074

**Purchase Receipt Lines:**

PO Number	Item Number	Qty To Ship	Qty To Invoice	Qty Ordered	Qty Invoiced	Qty Shipped	Unit Cost	Line Key	Line Number	Project Number	Non Inventory	Account Number
PO2074	100XLG	1.00	0.00	1.00	0.00	0.00	28.46000	16384	1		False	

**Shipment Type:** Shipment      **Company:** Fabrikam, Inc.      **CompanyID:** 9011

---

**WorkFlow Item Content**

Butler, Buckley, Deets INC.  
6161 BLUE LAGOON DR., STE 420  
MIAMI, FL 33126  
Phone: 305-262-0086 305-262-0187

Date: Mar 14 2018      To: Luc Schuman

**WorkFlow Item History**

Keyed	
previous state	Keying
new state	AP_Review
Changed By	Patel Jignesh
Changed On	01/19/2021 05:24:06 AM
Previous Owner	Nitin Shudra
Current Owner	Nitin Shudra
Comment	Raised the Keyed event

**Note:** When a user will download one or more Workflow items/documents from any item list or item viewer, and if the sum of file size exceeds 15 MB, then PaperSave will prompt "Download in progress" message and send an email with the download link which would be accessible only for 24 hours after the email is generated. Clicking on the download link, user will be redirected to PaperSave page from where a user can start downloading, if not automatically started. Also, an optional field named "File Size" is added to the item list in all the areas of PaperSave.

- **INTERRELATED DOCUMENT:** This option allows you to view any documents that may be indirectly associated to the selected record. This option is dependent on the inter-relationships that have been configured in the Configuration module.

## Slide up event panel in Workflow item list

The Workflow Area allows you to raise the Workflow events on the Workflow Items to have them traverse through organizational processes. Workflow Events panel pops-up in the bottom corner of the screen upon selecting one or more Workflow items from the Workflow item list as shown below.

ID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount	Invoice ID
18212	true	11/28/2017 06:46:15 AM	Initial	Work-Test	255	75548	true				
18213	true	11/28/2017 06:46:19 AM	Initial	Work-Test	255	75549	true				
305563	true	05/31/2019 04:25:20 AM	Keying	Work-Test	255	824601	true	A Travel Company		\$305,563.00	INV 1821
305567	true	05/31/2019 05:57:56 AM	Keying	Work-Test	255	824605	true				
431536	true	03/19/2019 05:37:40 AM	Keying	Work-Test	255	559451	true			\$1,000.00	INV 0
431537	true	08/06/2019 04:43:50 AM	Keying	Work-Test	255	1095722	true			\$200.00	INV 128
431618	true	08/07/2019 06:11:04 AM	Keying	Work-Test	255	1095852	true	New World Company		\$10,000.00	859652
441619	true	08/07/2019 06:05:39 AM	Keying	Work-Test	255	1095850	true	Denny Gunawan	08/02/2019	\$39.60	2013030
441620	true	08/08/2019 06:07:26 AM	Keying	Work-Test	255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020.00	00123
441625	true	08/07/2019 06:07:26 AM	Keying	Work-Test	255	1095845	true				

## Steps for Raising a Workflow Event

Workflow event panel will be raised in the Workflow item list if any of the below conditions are met:

- 1) If one or more Workflow Items or all the Workflow items are selected which belong to the same Workflow Step, except "Completed" step of the Workflow.
- 2) If the current user is either:
  - Owner of the selected Workflow Items
  - Administrator of the current Workflow
  - Workflow Super Admin

**Note:** Total number of Workflow Items selected will be reflected in the caption of Workflow Events button.

## WORKFLOW EVENTS

The Workflow events name can be as follows:

- **Approve:** To approve the Workflow item.
- **Reject:** To reject the Workflow item.
- **CustomEventName:** PaperSave allows you to create custom events based on your business processes. If a custom event is used, then the CustomEventName will be replaced by actual name of the Custom Event in the slide-up panel.

If you raise any Workflow event for more than one Workflow item, and Workflow fields marked as required for one of the currently selected Workflow items is empty, then it will show a dialog titled "**The following required fields are missing on one or more of the selected items. Events can only be raised on items in a Workflow when required fields are filled out**".

**Note:** For multiple items, the Workflow event gets raised for the Workflow items where the required fields are filled and canceled for those where required fields are kept blank .

Upon selecting the Workflow Items for raising events, you can enter a comment at the time of executing the event. The same comment will be added to the Workflow conversation panel.

**Warning:** If the Workflow event has "**Comments required**" property set to true in Configure area, then it shall highlight the red border for the comment box with message "**Please enter some comment**" upon leaving the comment box empty.

### **Notification for success or failure of Workflow event**

- You shall see a pop-up notification for success in the top right corner of the screen upon raising an event successfully for selected Workflow items.
- Similarly, you shall see pop-up notification for failure in the top right corner of the screen upon Workflow event failure.

- It shall display number in the bracket representing the total number of succeeded or failed items upon raising the Workflow event.

When Workflow event is raised successfully for all the selected Workflow items, then a pop-up notification showing the operation success shall be displayed on top right corner of the screen.

**Tip:** You can assign Workflow events to a particular Workflow step using Workflow designer from within Configuration Area.

## Status bar in Workflow item list

The status bar at the bottom of Workflow list displays details such as Workflow items per page, Page numbers, Filters applied hyperlink (to denote if any filters are applied on the Workflow item list or not), Clear Filters (option to remove the Filters from the current list) as shown in the below screen:

+ NEW REFRESH FILTER GROUP BY AND SUBTOTAL CHOOSE FIELDS EXPORT TO EXCEL												
<input type="checkbox"/>	ID	Created	Step	Owner	Batch	FileName	Bill Date	Vendor	Pay To Contact	Return To Contact		Quick Walkthroughs
<input type="checkbox"/>	<a href="#">30977</a>	06-26-2018 11:10:53 AM	Keying	Hardik Hapani		PaperSave.pdf	02-01-2016	90 Minute Courier Inc.			2	
<input type="checkbox"/>	<a href="#">30979</a>	06-26-2018 11:15:30 AM	Keying	Hardik Hapani		PaperSave.pdf	02-01-2016	90 Minute Courier Inc.			2	
<input type="checkbox"/>	<a href="#">30980</a>	06-27-2018 01:25:38 AM	Keying	Hardik Hapani		90 MINUTE_208012_02-01-2016_167.53.pdf						
<input type="checkbox"/>	<a href="#">30984</a>	06-27-2018 02:23:45 AM	Keying	Hardik Hapani		90 MINUTE_208012_02-01-2016_167.53.pdf						
<input type="checkbox"/>	<a href="#">30986</a>	06-27-2018 02:46:56 AM	Keying	Hardik Hapani		90 MINUTE_208012_02-01-2016_167.53.pdf						
<input type="checkbox"/>	<a href="#">30989</a>	06-27-2018 02:52:28 AM	Keying	Hardik Hapani		90 MINUTE_208012_02-01-2016_167.53.pdf	02-01-2016	90 Minute Courier Inc.			208	
<input type="checkbox"/>	<a href="#">30990</a>	06-27-2018 02:54:51 AM	Keying	Hardik Hapani		90 MINUTE_208012_02-01-2016_167.53.pdf	02-01-2016	90 Minute Courier Inc.			208	
<input type="checkbox"/>	<a href="#">30992</a>	06-27-2018 02:58:50 AM	Keying	Hardik Hapani		90 MINUTE_208012_02-01-2016_167.53.pdf	02-01-2016	90 Minute Courier Inc.			208	
<input type="checkbox"/>	<a href="#">30994</a>	06-27-2018 03:12:32 AM	Keying	Hardik Hapani		90 MINUTE_208012_02-01-2016_167.53.pdf	02-01-2016	90 Minute Courier Inc.			208	
<input type="checkbox"/>	<a href="#">30996</a>	06-27-2018 03:16:36 AM	Keying	Hardik Hapani		90 MINUTE_208012_02-01-2016_167.53.pdf	02-01-2016	90 Minute Courier Inc.			208	
<input type="checkbox"/>	<a href="#">30997</a>	06-27-2018	Keying	Hardik Hapani		90 MINUTE_208012_02-01-2016_167.53.pdf	02-01-2016	90 Minute Courier Inc.			208	

1 2 3 4 5

100 Filter Applied Clear Filter 1 of 1 pages (30 items)

The following are the options in the Status bar of Workflow list:

**1) Page number:** This option displays the page number in the Workflow Item list. It enables the user to traverse between various pages in the Workflow Item list.

- > : This option enables you to move to the next page in the Workflow item list (in case of multiple pages).
- < : This option enables you to move to the previous page in the Workflow item list (in case of multiple pages).
- |< : This option enables you to move to the first page in the Workflow item list (in case of multiple pages).
- >| : This option enables you to move to the last page in the Workflow item list (in case of multiple pages).

## **2) Page size/ no of items per page:**

This option enables you to define the maximum number of items to be displayed on a single page in the Workflow Item list. The default value is 100 items per page. The other options are 200, 500, and 1000.

**3) Filters Applied:** It displays "**Filters Applied**" if you have applied any filters on the Workflow items. Click on the hyperlink to **edit** the filter condition.

**4) Clear Filter:** This option displays "**Clear Filter**" if you have applied any filters on the Workflow items. Click on the hyperlink to **clear** the applied filters.

**5) Current of Total Page and Total Items:** This option displays the **current page number** with a total number of pages and total number of Workflow items (current page) in the Workflow item list.

For Example: **X of Y pages (Z items);**

where,

- X: Current page number in the Workflow item list.
- Y: Total number of pages in the Workflow item list.
- Z: Total number of items in the selected Workflow.

## Adding documents to PaperSave Workflow Area

You can acquire the documents for selected Workflow using any of the available methods such as "Scan using **Fujitsu fi-NX** ", "Scan using **TWAIN compliant scanner**", Scan using **Check scanner** or "Drag items or select the files to **upload** from **file explorer**".

You can explore the details on how to add the documents to a selected Workflow. The Acquire view is the window that opens as you click **+NEW** button on Workflow Area's list toolbar. You will see the steps to add documents in the following sections:

- Scan/ Upload documents using any of the supported [Acquisition methods](#).
- [Set a Batch and default field values](#) for the documents as they are scanned/ uploaded through the Workflow Area.
- Track the status of the documents through Workflow Area from [Unsubmitted item list](#) panel.

## File capture options panel in Workflow Area

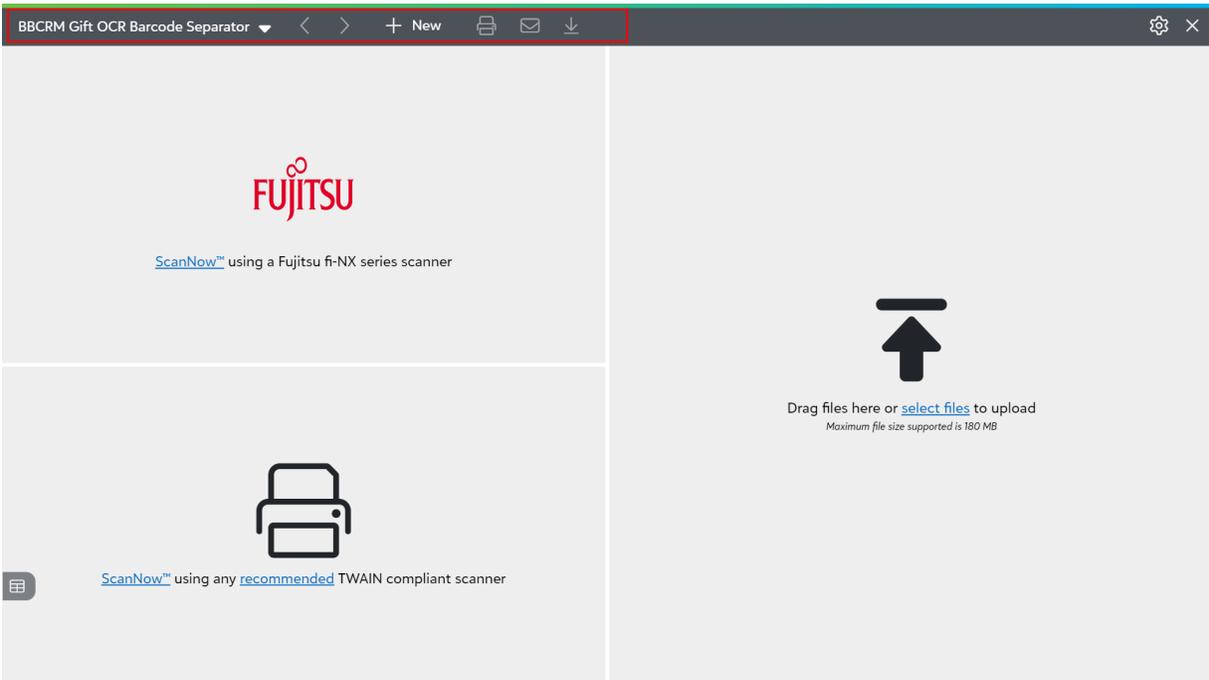
You can select any of the following file capture options to acquire the Workflow documents in PaperSave:

- [ScanNow using TWAIN compliant scanner](#)
- [ScanNow using Fujitsu fi-NX series scanner](#)
- [Drag items or Select the files to upload](#)
- [ScanNow using Check scanner](#)

You may also learn more about the various Top level toolbar options, Settings and Unsubmitted items from the [file capture options panel](#).

## Top level toolbar in File capture options panel

Workflow Area presents a top level toolbar in file capture options panel as shown below:



The following is the description of each action in the top level toolbar:

- **Name of the drop point:** This option displays the name of the current Workflow drop point.

**Note:** You will see only such drop points for which the current user has rights to add documents using that drop point.

- **Previous:** Click on this option to navigate to the previous item in the unsubmitted items list. It will remain disabled if there are no previous items in the unsubmitted items list.

- **Next:** Click on this option to navigate to the next item in the unsubmitted items list. It will remain disabled if there are no next items in the unsubmitted item list.
- **Print:** Click on this option to print the selected document from the Unsubmitted item list.

**Note:** PaperSave prints the Workflow items along with all the annotations on the document (if they exist). Also, PaperSave allows the user to print single document at a time.

- **Email:** Click on this option to share the Workflow item as an e-mail attachment.
- **Download Content:** Click on this option to download the Workflow item.
- **Submit selected items :** Click on this option to submit the selected unsubmitted items from the slide out panel. This option gets enabled as you select one or more items from the unsubmitted item list.
- **Settings**

You can define preferences for various app features from the Settings panel. Click [here](#) to get more details on setting options available in the app's unsubmitted item view.

- Click "**X**" or hit **Esc** key to exit the File Capture options panel.

## Set Batch and Field Defaults

When adding items using either a scanner or uploading them from your file explorer, the area will prompt you with a dialog titled: "**Set Batch & Field Defaults**". This dialog lets you add the items you are acquiring to a new or existing batch as well as set default values for profile fields as shown below.

Set Batch & Field Defaults

Batch:  [Auto generate](#)

▲ Set defaults for this acquisition

Vendor :

Invoice Date :

Invoice Amount :

Invoice Number :

Don't ask me again

OK Cancel

## Batch

This allows you to add the documents being acquired to a specific batch (group).

- You can **manually** enter that batch name or select it from the drop-down list to add the items to an **existing batch**. This dropdown list shows all the batches that currently have unsubmitted items.
- You can enter the batch name manually to add the document to a **new batch** or click on the "**Auto-generate**" link to assign an auto-generated number to the batch. Also, you can click on the "Auto-generate" link to assign an auto-generated number to the batch.

**Note:** If you keep the batch field empty, then your items will be added without a batch. The details of the batch for each item will be displayed in the batch column in the slide out panel.

**Note:** The maximum character limit for manually entering the Batch details is 30.

The special characters can be included in the batch name:

Special characters to be considered:

- ~ ` ! @ # \$ % ^ & \* ( ) \_ - + = { } | [ ] \ ; : " ' < > ? , . /

Spanish characters to be considered:

- á, é, í, ó, ú, ñ, ü, ç, ÿ

French characters to be considered:

- ë, ï, ü, à, è, ù, â, ê, î, ô, û, é, Ç

## Setting defaults for this Acquisition

You can set default Profile field values here that will override other default values configured for the drop point, document type, and Workflow fields.

**Note:** The default values loaded in the profile fields will be driven by **Drop points defaults first**. If the drop point defaults are not set, then it will consider **Document type defaults** or **Workflow field defaults**. Otherwise, the profile fields will be empty and user can manually set the individual values.

## Don't Ask me again

You can turn off the batch prompt by checking off "**Don't ask me again**" and clicking on "**OK**". your preference will be saved for subsequent acquisitions and you will no longer be prompted to add a batch or for the opportunity to set default values for fields being acquired.

**Tip:** If you need to change the preference and turn the prompt back on, then you can do so from the settings panel by turning the toggle switch labeled: "Batch and Defaults" to "**ON**" as shown in the below screen.

### **Prompt for Batch Name and Defaults**

Allows a user to set the batch name and to also set default values for all items that come through an acquisition action. Turning this setting off will result in the system automatically setting a batch name



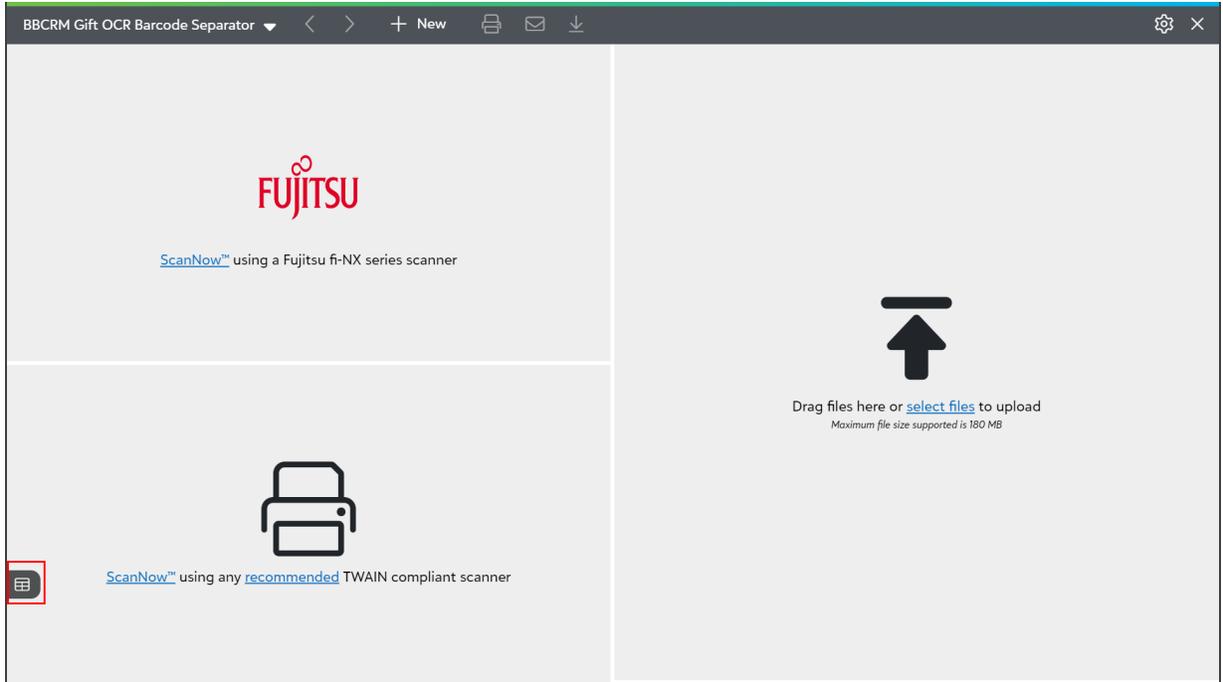
## Unsubmitted Item list

### **Tracking acquisition status from the item list**

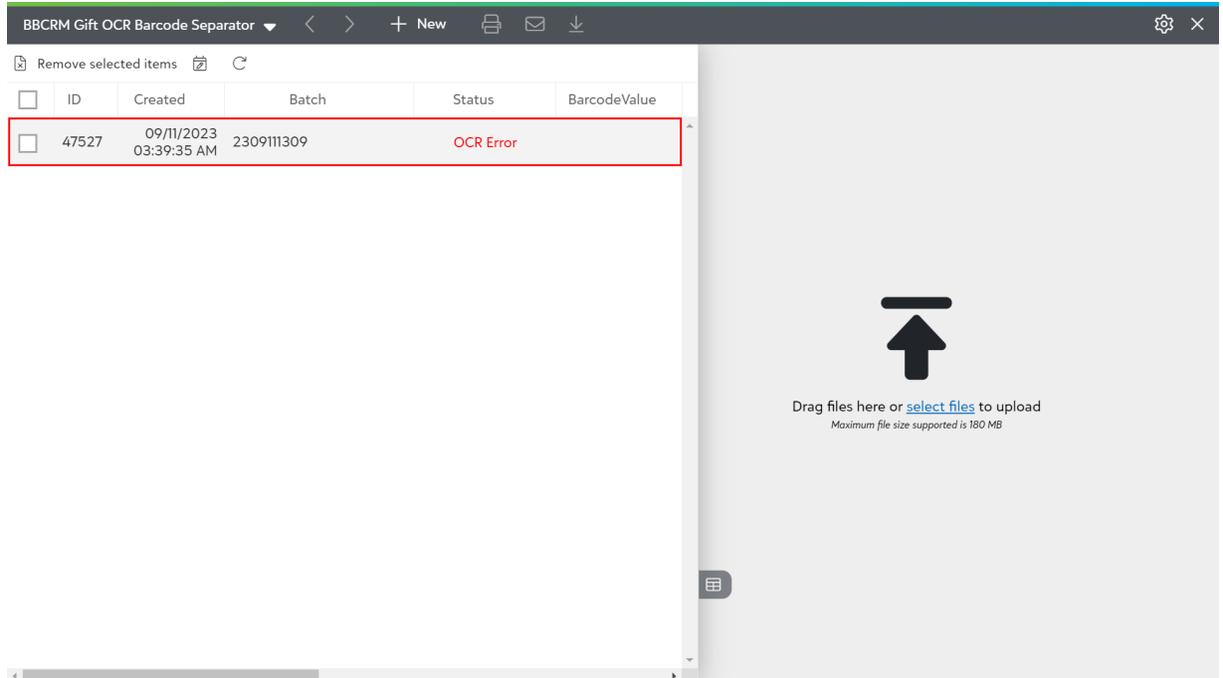
The item list slide-out panel shows the list of items that have been acquired but have not yet been submitted.

### **Accessing the unsubmitted item list**

You can open the item list by clicking on the grid icon as shown below.



After clicking on the grid icon, a slide out panel will open with the list of unsubmitted items :



The unsubmitted item list, will display the list of unsubmitted items. You will see the properties of each item in the grid including the item ID, Batch, Status, Actions, and other columns in each item row.

The following are statuses that may show for unsubmitted items in the list:

### 1) **OCR in Progress**

Workflow items acquired through the Workflow Area go through a process where Optical Character Recognition (OCR) is used to read and extract data off of the documents that are captured. The area will show a status of "**OCR in progress**" while this process is executing.

### 2) **OCR Error**

The status of "**OCR Error**" will show red hyperlinked text on an item when an error is encountered while going through the OCR process. Clicking on the hyperlink will reveal the details of the exact error encountered. When errors are encountered, you will have the opportunity to re-initiate the OCR process by clicking on the "**Retry**" hyperlinked text in the Action column.

### 3) **OCR Completed**

A status of "**OCR completed**" will display for an item once it has gone through the OCR process successfully. You can expect to see data injected into fields captured by the OCR process with the confidence score of the capture once you see an item with this status.

### 4) **Submission in Progress**

A status of "**Submission in progress**" will display on an item when you submit an item. This status will show until the item is either submitted successfully or an error occurs.

### 5) **Submission Error**

The status of "**Submission Error**" will show on an item if an error is encountered during the process of submission. Clicking on the hyperlink will reveal the details of the exact error encountered. When errors are encountered, you will have the opportunity to re-initiate the submission process by clicking on the "**Retry**" hyperlinked text in the Action column.

## 6) Completed

A "**Completed**" status will display briefly on an item when the submission completes successfully. A completed item disappears from the unsubmitted items list after displaying this status for a couple of seconds.

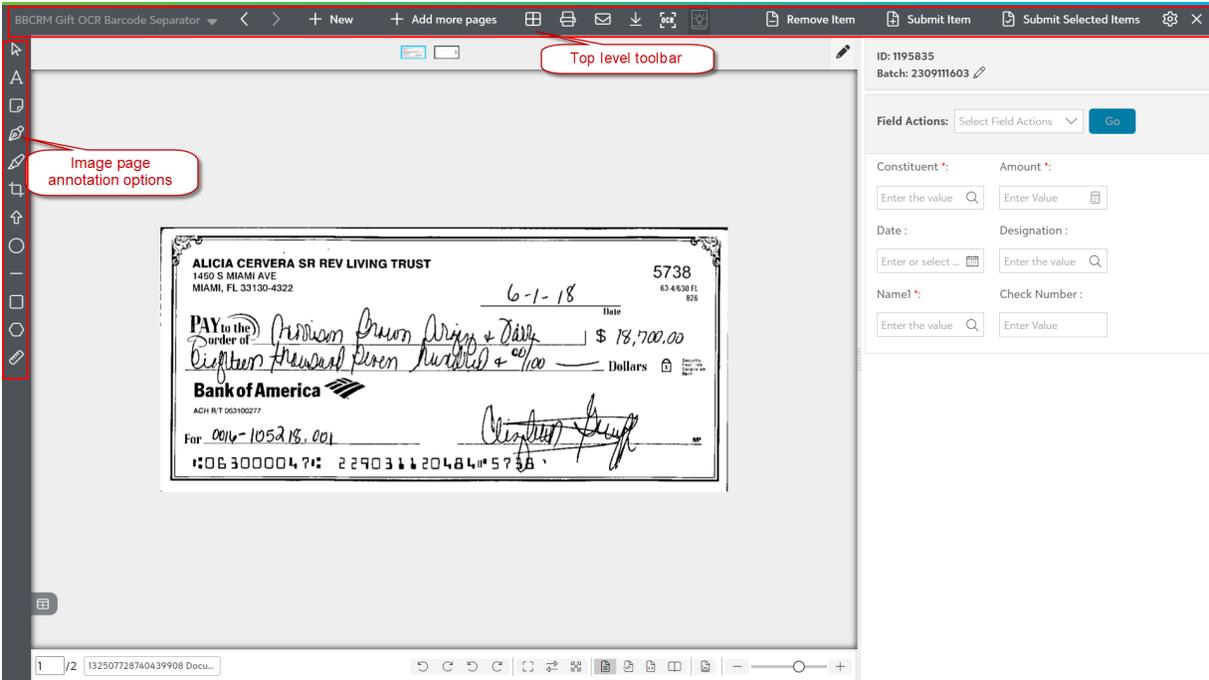
**Note:** Click [here](#) to learn more from the video about the unsubmitted item list.

## Validating documents in PaperSave Workflow Area

Unsubmitted Workflow items can be worked on from the item list and opened in the item viewer once they are acquired successfully. Various operations can be performed on Workflow items while working with them in the item viewer such as editing fields, adding annotations, page manipulation, submit one or more unsubmitted items, etc.

Watch the [video](#) to learn how to validate the Workflow item before submitting it to the Workflow.

The below screen displays the various options available in the Item viewer for validating the Workflow item.



The following is the description of various options available to validate the Workflow item in the Workflow Area:

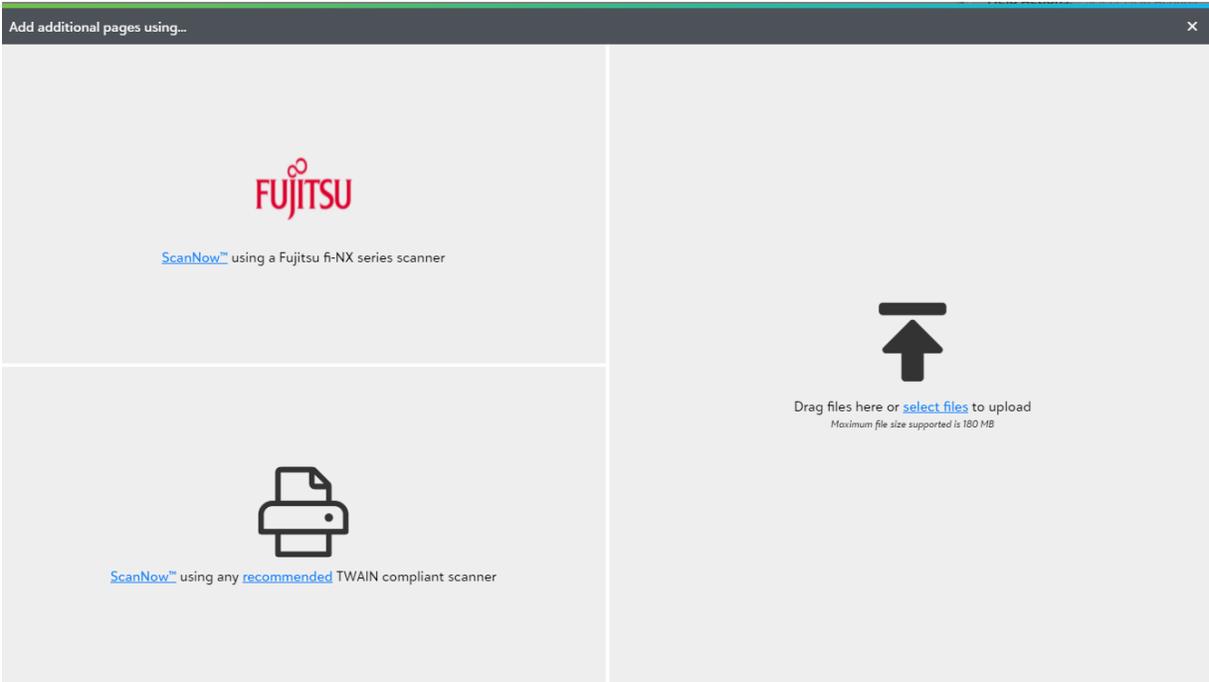
### 1) Top level toolbar options in the Item viewer for unsubmitted items:

The following are the options in the top level toolbar of item viewer for unsubmitted items:

- : Click on this option to navigate to the previous unsubmitted item. It will be disabled if there is no previous item.
- : Click on this option to navigate to the next unsubmitted item. It will be disabled if there is no next item.
- : Click on this option to switch to File capture options panel to acquire a new document.

 Add more pages

: Click on this option to add more pages to the current document. clicking on this option will display the following "Add additional pages" prompt.



: This option will navigate you to the Page Manipulation View for unsubmitted items in the Workflow Area where you can perform various operations such as cut, copy, paste, rotate, etc. on the unsubmitted items. Click [here](#) to know more about Page Manipulation View.



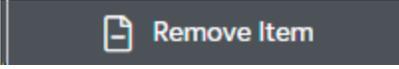
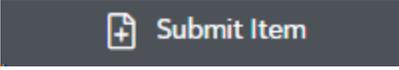
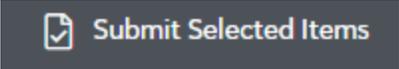
: Click on this option to print the current document.



: Click on this option to share the item via email. Currently, this feature is not yet implemented.



: Click on this option to download the current document.

- : Click on this option to process OCR on the items. Using this option will override the current profile field values.
- : Click on this icon to use the OCR learn by fingerprint or learn by key feature.
- : Click on this option to discard the current item.
- : Click on this option to submit the current unsubmitted item.
- : Click on this option to submit items selected in the unsubmitted item list.

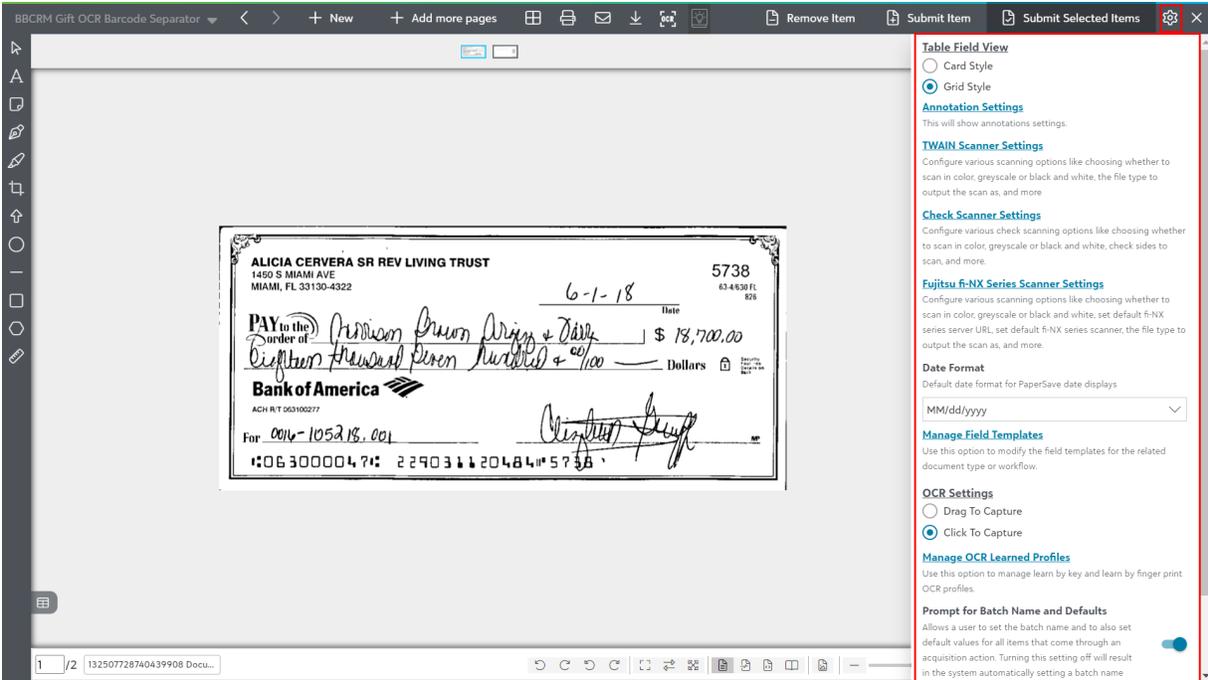
2) **Using Image page options(Annotations) for Unsubmitted items:** You can add different annotations using the Image page options toolbar on the left-hand corner of the screen. Click [here](#) to know more about it.

### 3) **Item Viewer Settings panel for unsubmitted items**

- : Click on this option to define your preferences in the Settings panel in Item viewer for unsubmitted items:

Watch the [video](#) to learn the Item Viewer Settings options for unsubmitted items.

- Click on  icon in the top level toolbar to open Settings panel in the right corner of the screen as shown below:

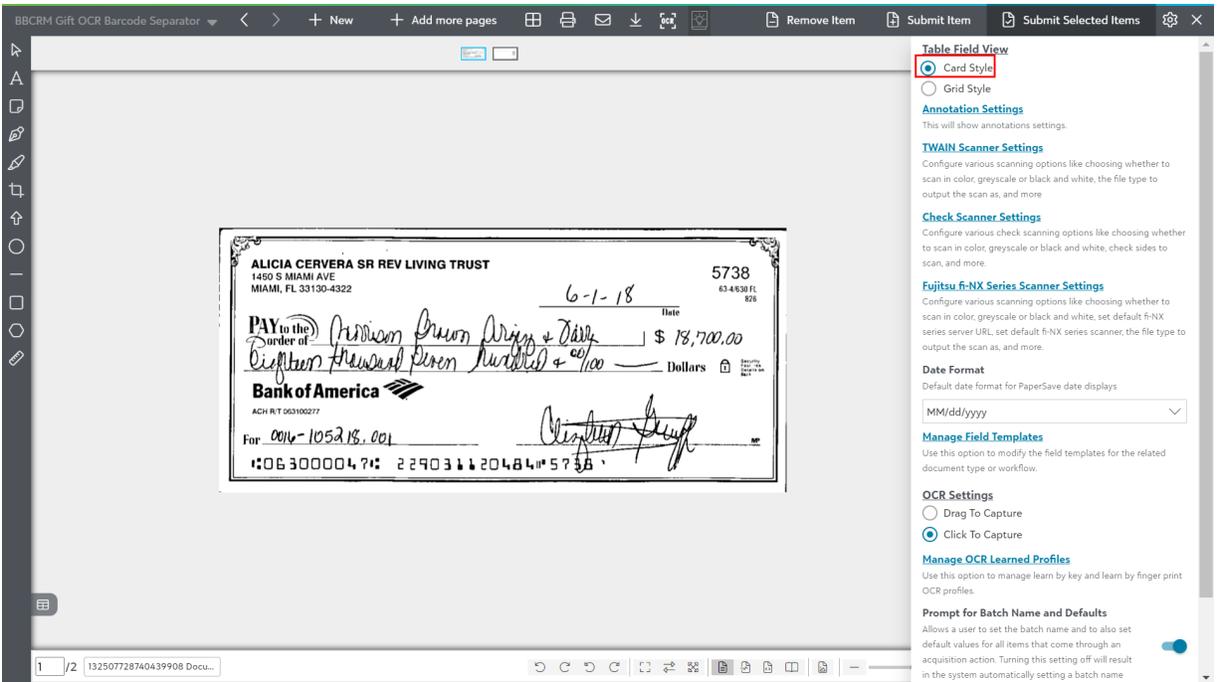


The following is the brief description of various preferences in the Settings panel:

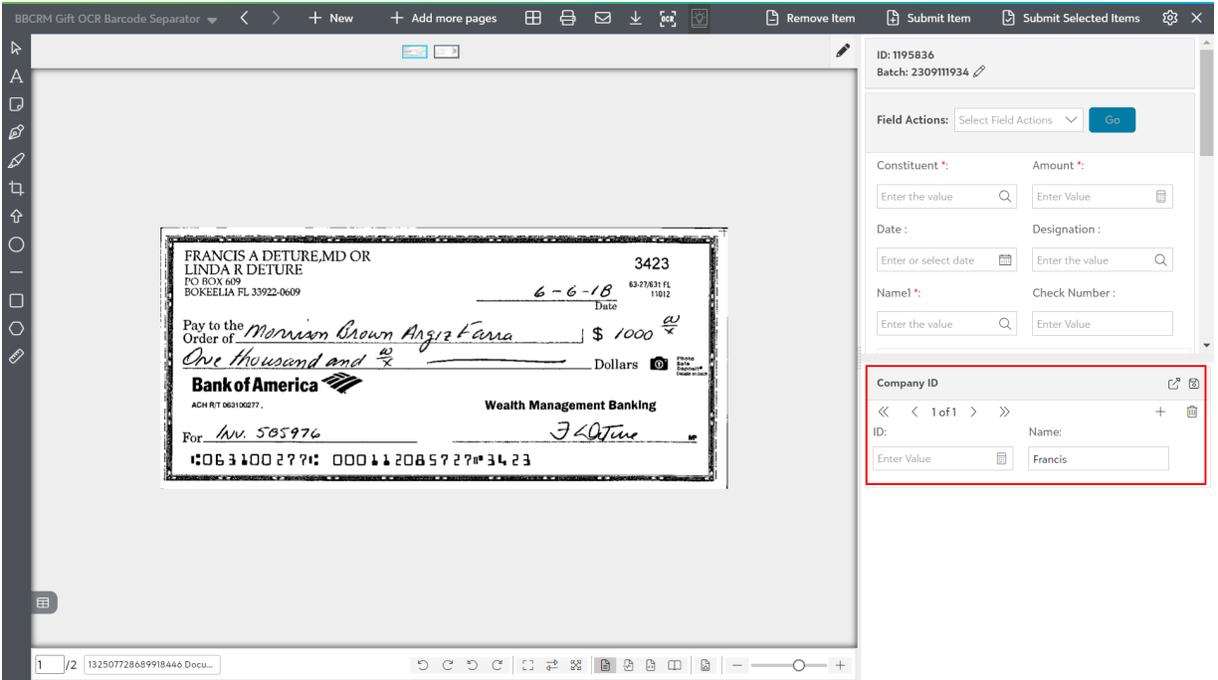
4) **Table Field View:** PaperSave offers a widget with two different user interfaces (card style and grid style) for the table type fields in the document profile field panel. Card style is set as the default option.

a) **Card Style:** It switches the "table type field" widget to a card style view.

- Select the Card style option in the Table field view Settings, as shown below:

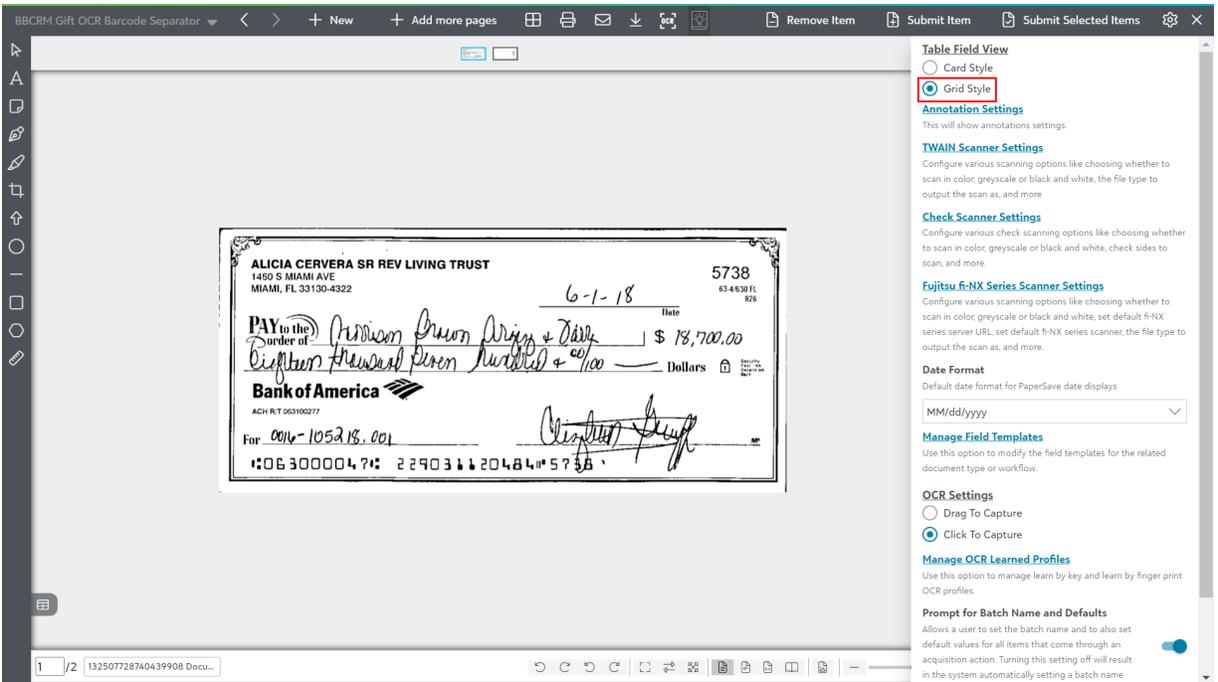


- You will see "**Card Style view**" for the Table type fields in the document profile field panel while editing the field as shown below.

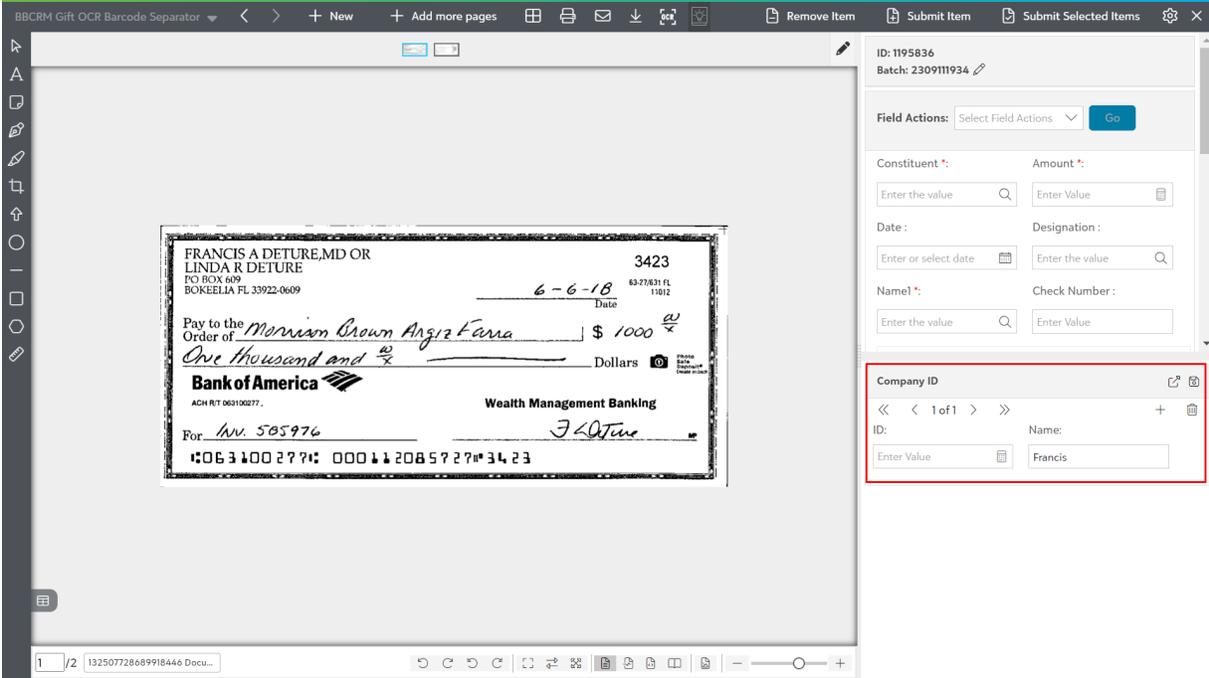


b) **Grid Style:** It switches the "table type field" widget to Grid style view.

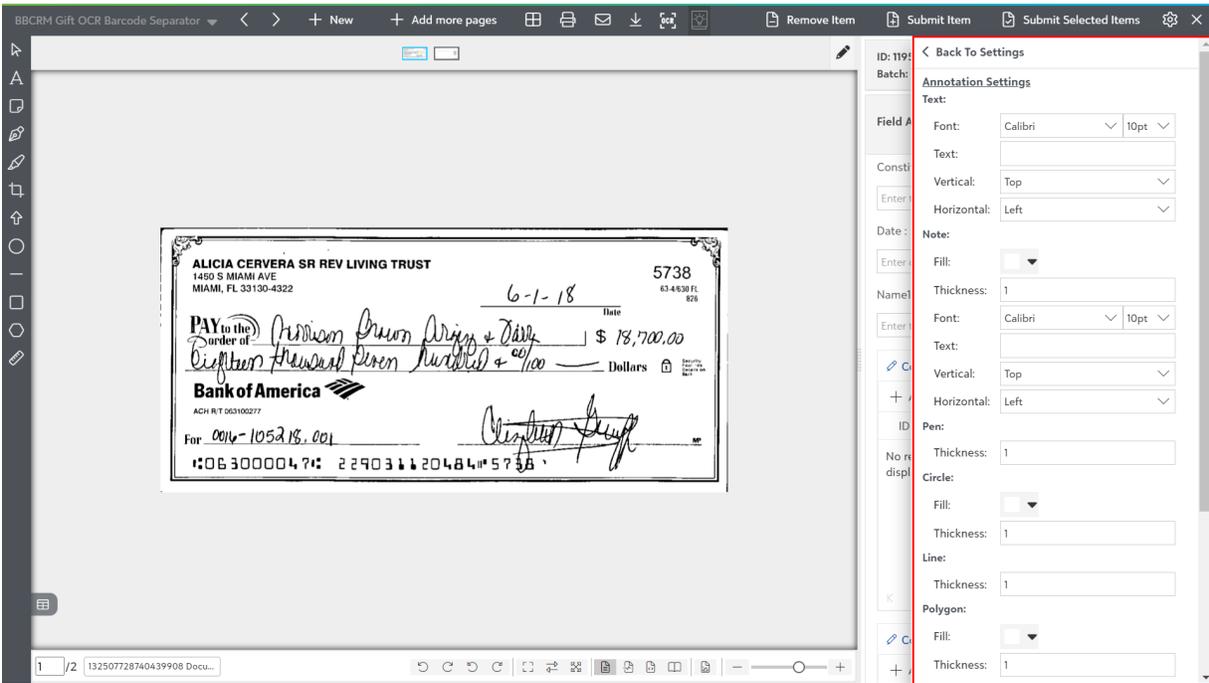
- Select the Grid style option in the Table field view Settings as shown below:



- You will see "**Grid Style view**" for the Table type fields in the document profile field panel as shown below.



c) **Annotation Settings:** This Setting option enables you to adjust the following preferences for each annotation tool in the Workflow Item Viewer.



- **Text, Note:** Select font, font size, default text, vertical and horizontal alignment.
- **Pen, Circle, Line, Polygon, and Arrow:** Select the thickness and color.
- **Highlighter:** Select the color.

d) **Twain Scanner Settings:** This Setting option enables you to configure the following scanner related preferences as shown below:

[← Back To Settings](#)

**TWAIN Scanner Settings**

Scan Type:  ▾

Page Sides to Scan:  ▾

DPI:  ▾

**Time in seconds before assuming scanning is complete**

Use this to set time in seconds before PaperSave assumes it is no longer receiving pages from the scanner. Once this time has passed after receiving a page, then PaperSave will consider the scanning of a specific stack to be complete. Configure this to a higher number if the speed of your scanner and or internet connection heavily fluctuates. Be advised that the longer you set this time to be, the slower scanning will feel.

▾ ▲

**Show TWAIN driver settings before scanning**

Turning this on will prompt users with the native TWAIN settings panel of the scanner they are using. This will allow them to control scanner specific settings prior to scanning.

**Use a default scanner**

Setting this off will clear the default scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

**Prompt to continue scanning**

When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

## 1) Scan Type: Black & White, Gray Scale, Color

**Tip:** We highly recommend using the **Black and White** scan option as it uses the least amount of disk storage space and yields the fastest processing.

## 2) Page Sides to Scan

- Single Side
- Both sides

**Note:** If your scanner supports skipping or ignoring blank page, then we recommend you setting the Page Scan options to Scan **Both sides**(Duplex).

**3) DPI ( Dots per inch):** The smaller the DPI number, the less sharp the image will appear. However, size of the image will increase as you increase the DPI number.

**Note:** We recommend that you use 300 DPI.

**4) Show TWAIN driver settings before scanning:** Turning this on will prompt users with the native TWAIN settings panel of the scanner they are using. This will allow them to control scanner specific settings prior to scanning.

**5) Use a default scanner:** Setting this off will clear the default scanner chosen by you previously, and you will be prompted for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

**6) Prompt to continue scanning:** When this option is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

**7) Check Scanner Settings:** This Setting option enables you to configure the following check scanner related preferences as shown below:

← Back To Settings

**Check Scanner Settings**

Scan Type: Black and White

Page Sides to Scan: Single Side(Simplex)

Double Feed Detection:

Prompt to continue scanning   
When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

Enable Rear Endorser:

Endorsement type\*:

Endorsement Line 1\*:

Endorsement Line 2:

Endorsement Line 3:

Endorsement Line 4:

Endorsement Line 5:

**a) Scan Type:** Black & White, Gray Scale, and Color

**Tip:** We highly recommend you to use Black and White scan option as it uses the least amount of disk storage space and yields fastest processing.

- **Page Sides to Scan**

- Single Side (Simplex)
- Both Sides

**Note:** We recommend you setting the Page Scan Options to Scan Both Sides (Duplex) if your scanner supports skipping or ignoring blank page.

- **Prompt to continue scanning:** When this option is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.
- **Enable Rear Endorser:** This option allows the user to enable and disable the rear endorsement for the checks. The endorsement can be virtual or physical, depending on your check scanner.
- **Endorsement Type:** This option will define if the rear endorsement is printed on the physical check or on the image of the check in the gift item document. You can select one or both options.
- **Endorsement Line 1 to Endorsement line 5:** This sets the lines you want printing (virtually or physically) on the back of checks. This option requires on the Enable Rear Endorser option to be turned **on**.

**Note:** Your check scanner must support this feature for using Rear endorser options.

8) **Fujitsu fi- NX Series Scanner Settings:** This Setting option enables you to configure the following Fujitsu fi-NX scanner related preferences, as shown below:

### Fujitsu fi-NX Series Scanner Settings

Scan Type:

Page Sides to Scan:

Use a default fi-NX scanner

Setting this off will clear the default fi-NX scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

Prompt to continue scanning

When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

- **Scan Type:** Black & White, Gray Scale, and Color

**Tip:** We highly recommend you to use **Black and White** scan option as it uses the least amount of disk storage space and yields fastest processing.

- **Page Sides to Scan**
  - Single Side
  - Both sides

**Note:** We recommend setting the page scan options to scan both sides (Duplex) if your scanner supports skipping or ignoring blank page.

- **Use a default fi-NX scanner:** Setting this off will clear the default fi-NX scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.
- **Prompt to continue scanning:** When this option is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

9) **Date Format:** This option enables the user to change the default date format. By default it is MM/dd/yyyy.



The image shows a dialog box titled "Date Format". Below the title, it says "Default date format for PaperSave date displays". There is a text input field containing "MM/dd/yyyy" and a dropdown arrow on the right side of the field.

You can define the desired preferences to any of the following date format options.

- MM-dd-yyyy
- MM/dd/yyyy
- dd-MM-yyyy
- dd/MM/yyyy
- yyyy-MM-dd

Once any of the above date format is selected, it should save/update the new date format for that user upon exiting of the Settings menu.

10) **Manage Field Templates:**User this option to modify the field templates for the related document type or workflow.

**[Manage Field Templates](#)**

Use this option to modify the field templates for the related document type or workflow.

11) **OCR Settings:** This Setting option enables you to configure OCR-related preferences in the Workflow item viewer, as follows. Set the preference to use the drag or click action to correct the profile fields values on items processed by OCR.

**OCR Settings**

Drag To Capture

Click To Capture

- **Drag to Capture:** Choose this option to capture the value from the document and drag that selected value to desired document profile field.
- **Click to Capture:** Choose this option to capture the value from the document and click on the desired document profile field to auto-fill the captured value.

**Note:** The Click/Drag to Capture options will only be applicable for documents processed by OCR.

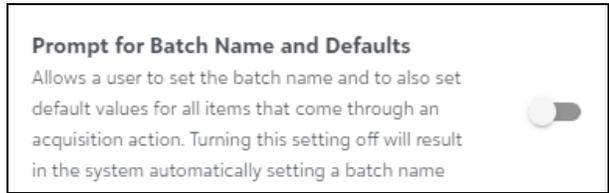
12) **Manage OCR Learned Profiles:** You can use this option to manage the OCR learn by key and learn by finger print OCR profiles.

**[Manage OCR Learned Profiles](#)**

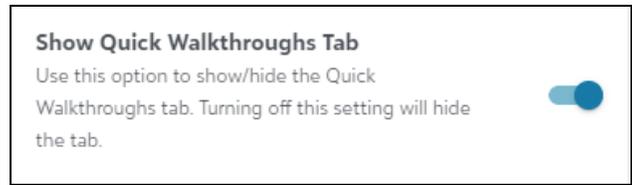
Use this option to manage learn by key and learn by finger print OCR profiles.

13) **Prompts for Batch Name and Defaults:** Enabling this option turns on the prompt for batch and field defaults. The prompt is on by default but can be turned off by selecting the checkbox labeled "**Don't ask me**

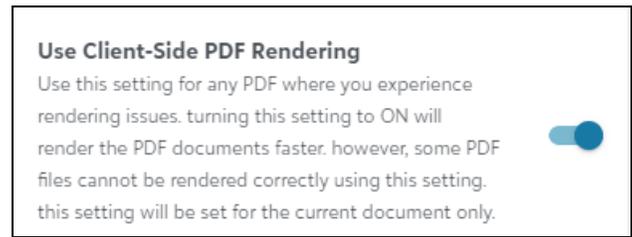
again" in the "Set Batch and Field Defaults" dialog. Turning this setting off will result in the system automatically setting a batch name. Similarly, Setting the option **ON** restores the prompt.



14) **Show Quick Walkthrough Tab:** Use the toggle button to show/hide the green Quick walkthroughs on the screen.



15) **Use Client-Side PDF Rendering:**Use Client-Side PDF Rendering" option within the item viewer's settings panel which on enabling helps to load the PDF document faster than the Server-side rendering. For more details, refer to [Client-Side Rendering](#).



## Review and edit Profile fields

The field panel is located at the right-side of the item viewer with various fields related to document type or Workflows. The field data can be automatically captured via Optical Character Recognition (OCR) technology, looked up against values in Integrated Application's database (using SQL), Web API, Blackbaud SKY API, and PaperSave Database or entered manually. Fields that are captured via OCR will show a percentage value in parentheses next to the field label. This percentage represents the confidence that the OCR engine has in the value it captured. The more exact the match, the higher the confidence score.

It is recommended that you double-check and validate all values captured by OCR. Still, it would be best to focus on validating all the values with a low confidence score. If the auto filled values are incorrect or inaccurate, then you can edit such profile fields manually or use the drag to capture tool to automatically select text from the document, drag, and then drop it on the field. See the [drag to capture](#) section for more details on how this works.

The fields types of the profile field vary across different Workflows and document type defined in the Configuration Area. For Example - A date field value will have a date picker widget to enter the date value. It can be modified manually such as in cases where the OCR may not have captured the right date.

Similarly, based on the Workflow fields properties, some fields such as vendor, PO Number, etc can be looked up against the Dynamics 365 Finance's database using different properties. For amount related fields such as Invoice amount, you can optionally use the calculator widget to perform desired calculations and determine the amount. The value of this field is defaulted to the amount captured by OCR in case if the document went through OCR processing successfully.

You can default the view as Card style view or Grid style view in Table Type fields such as Line items, distribution, Purchase Receipt Line, etc. This preference can be defined in the settings panel.

**Note:** The fields in the Workflow item field panel may vary based on the user's access rights across different Workflows.

## Correcting fields using Drag to Capture tool



The Drag to Capture tool allows you to hover over document , grab onto it, and drag it over a field and let go to drop that word into the field. This option is available on the top-level toolbar of unsubmitted item viewer. You can capture (which draws a highlighted area around the selected text) multiple words, grab onto them, and drag them over a field to drop all those words into the field. This is a very useful tool to validate and correct values that were not captured correctly by OCR or to help make manual entry more efficient.

**Note:** This option is only applicable for documents or items that successfully went through the OCR process.

## Submitting documents to PaperSave Workflow Area

Once the unsubmitted workflow item get validated, you can submit that item to the Workflow:

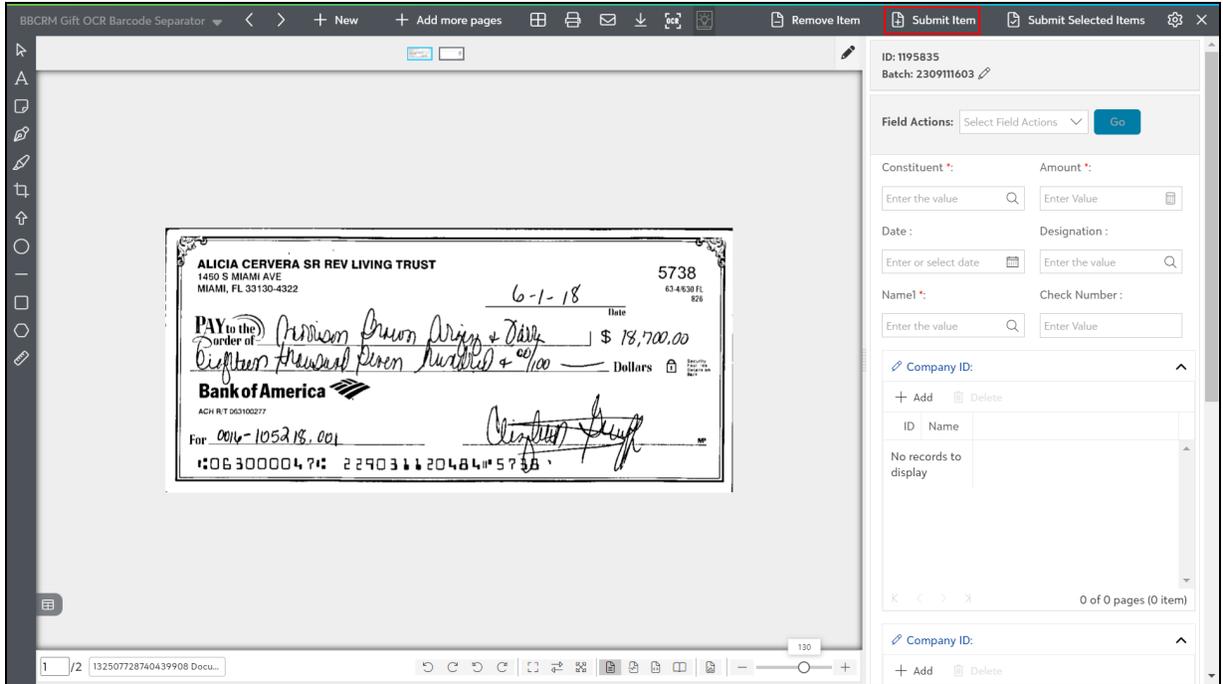
Watch the [video](#) to learn how you can submit an item to the Workflow.

You can submit items to Workflow in the Workflow Area upon validating the profile fields using any of the following options:

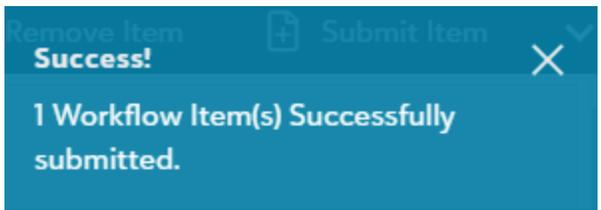
- Submit current item in the item viewer using **Submit item**.
- Submit one or more Workflow item from the unsubmitted item list using **Submit Selected items**.

### **1) Submit item**

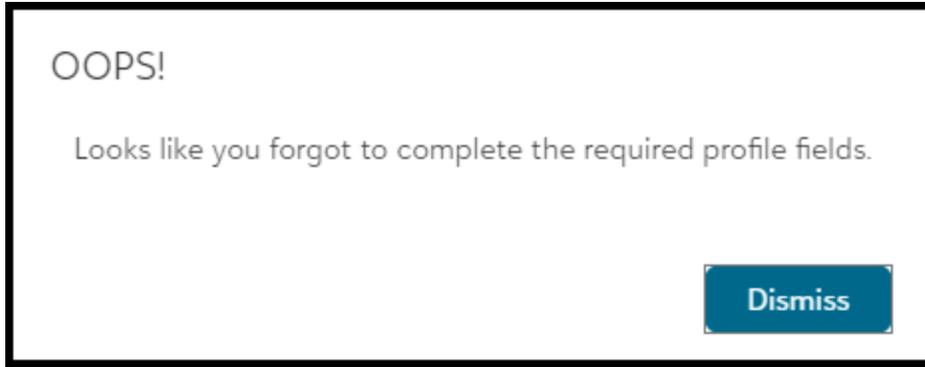
Once you are done validating the profile fields and you have entered the required fields, then click on the **Submit Item** in the Top level toolbar (as shown in the below screen).



- It shows a success notification in the top right corner of the screen upon successful item submission as shown below:



- If you try to submit a single item without entering the required fields, you will encounter the following error:



## 2) Submit Selected Items:

- Once you are done validating the profile fields for the Workflow items that you wish to submit, Navigate to Unsubmitted Item list where only current item will be selected as shown in the below screen.

The screenshot shows a software interface with a table of items and a detailed view of a selected item. The table has columns for ID, Created, Batch, Status, and Action. The selected item (ID 47528) is highlighted with a red border. The detailed view shows fields for Constituent, Amount, Date, Designation, Name, and Check Number, along with a Company ID section.

ID	Created	Batch	Status	Action	
<input type="checkbox"/>	47527	09/11/2023 03:39:35 AM	2309111309	OCR In Progress	
<input checked="" type="checkbox"/>	47528	09/11/2023 06:33:27 AM	2309111603	OCR In Progress	
<input type="checkbox"/>	47529	09/11/2023 10:05:04 AM	2309111934	OCR In Queue	

Item Details:

ID: 1195835  
Batch: 2309111603

Field Actions: Select Field Actions [Go]

Constituent \*: [Enter the value] [Q] Amount \*: [Enter Value] [Q]

Date: [Enter or select date] [Q] Designation: [Enter the value] [Q]

Name \*: [Enter the value] [Q] Check Number: [Enter Value] [Q]

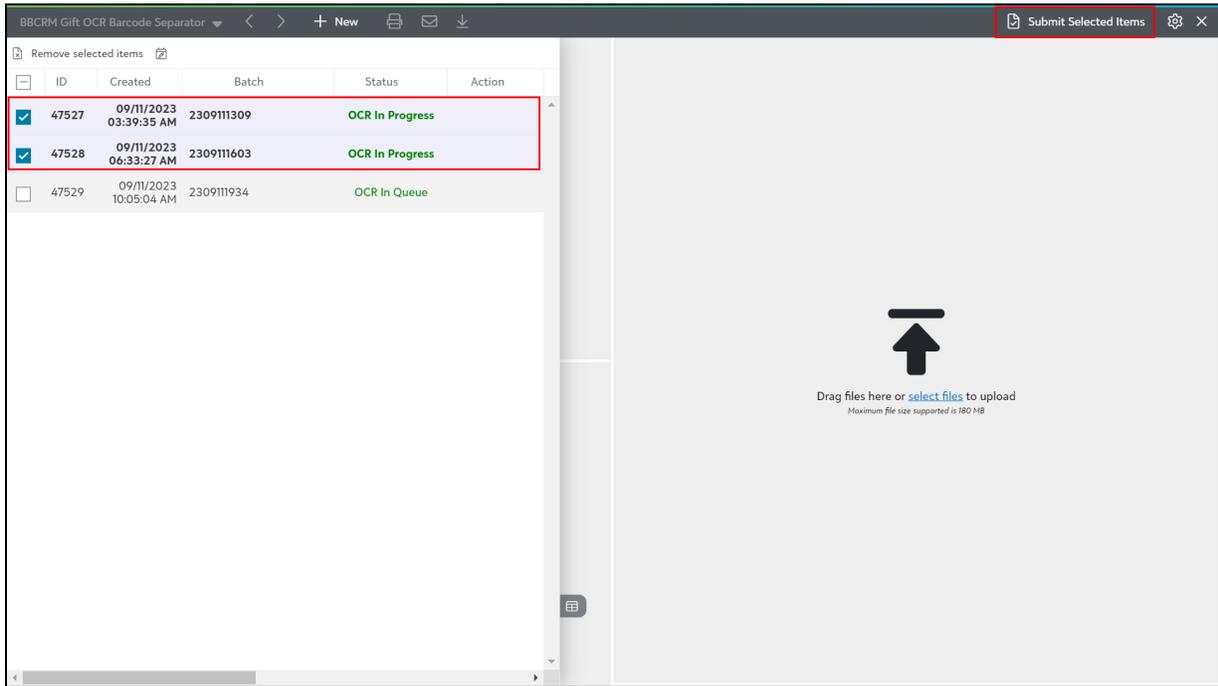
Company ID: [Add] [Delete]

ID	Name
No records to display	

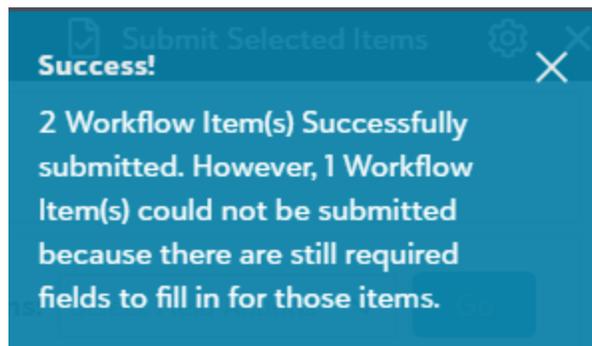
0 of 0 pages (0 item)

- Select the multiple items from the unsubmitted item list that you wish to submit.

- Now, click on the **"Submit Selected Items"** from the top level toolbar as shown in the below screen.



- Now, you will see the following toast notification where it shows the number of items that were submitted successfully. Also, it shows the number of items that were not submitted along with the reason. As we can see, the required fields were incomplete for one item which led to its submission failure.



- Thus, when you use the "**Select Submitted items**" for submitting multiple items, it will display the number of items that were submitted successfully and the number of items that failed to submit along with the reason for submission failure.

## Viewing documents in PaperSave Workflow Area

All the Workflow items that are submitted will be added to the selected Workflow. You can click on a document to open in a document viewer. You can annotate the document if necessary and can edit the Document comment field, and print, download a copy and share a copy.

PaperSave enables the user to access the Workflow document by two ways as follows:

1) **Embedded Workflow item viewer** from within the Workflow Area: You can open the document by double clicking on the desired item from the Workflow grid. It will open the document in the Workflow item viewer from within the Workflow Area.

2) **Standalone Workflow item viewer**: You can also access the Workflow items in **Standalone Workflow item viewer** in an independent window. Upon receiving an email notification for one or more Workflow items, you can click on the link to access the items in the Standalone Workflow item viewer. Email notifications make it quick and easy for users that are not working in PaperSave to raise events (approve, reject, etc.) for their workflow items.

The following topic is covered:

- [Types of user interfaces to view documents](#)

## Types of user interfaces to view documents

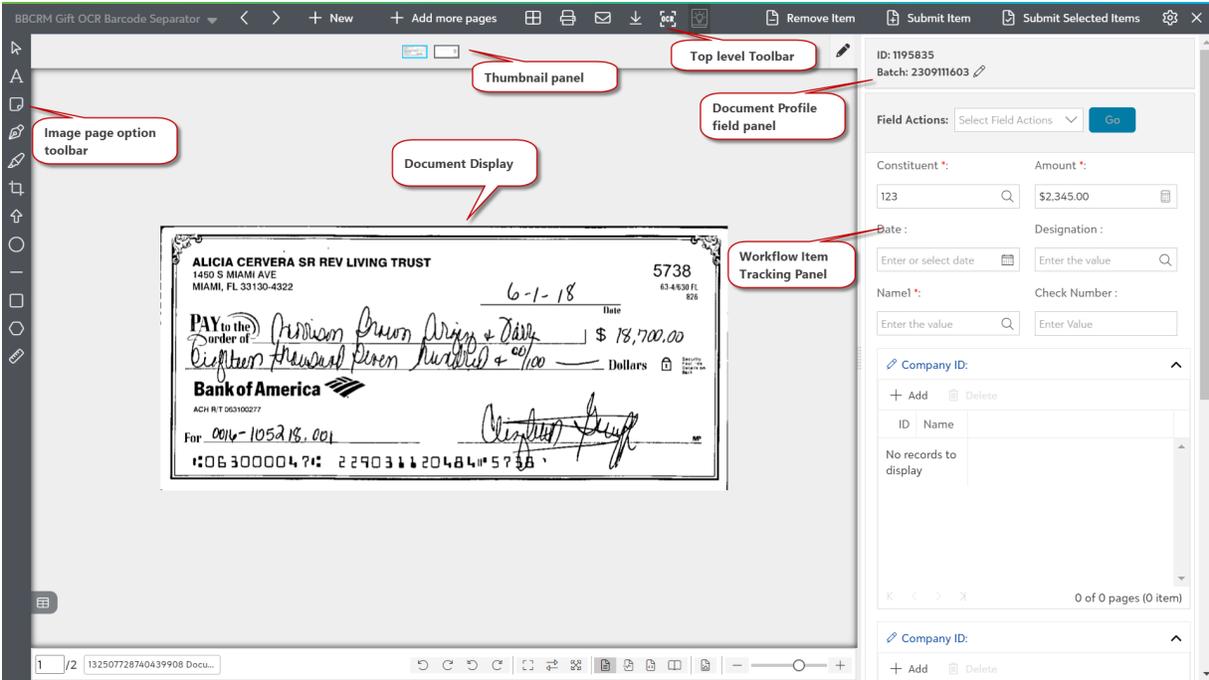
This section covers the various options that PaperSave Workflow Area provides for viewing a Workflow item. Workflow users can access the desired Workflow items to perform various operations such as editing the profile fields, adding annotations, adding more pages etc.

The following are the two different user interfaces to view Workflow items:

- [Embedded Workflow item viewer](#)
- [Standalone Workflow item viewer](#)

### Embedded Workflow item viewer

The Embedded Item Viewer is the interface you will see when opening an item directly from the Workflow item list. This Interface allows you to view the Workflow items available in the Workflow list and perform various actions on it. Double click on Workflow item in the Workflow list to open it in the embedded Workflow item viewer as shown below:



Below is the brief description of various sections in Embedded Workflow item viewer:

## 1) Top level Toolbar

You can perform following operations on the Workflow item from the Top level toolbar.

- Click on  **Previous** and  **Next** to navigate between items in the item list.
- Click on  **+ Add more pages** to add pages to the currently selected document.
- Click on  to **print** the current Workflow item.
- Click on  to **share** the current Workflow item via Email.
- Click on  to **download** the current Workflow item.
- Click on  **edit the form** to edit the SmartForm when applicable for the document if it exists.

- Click on  **View Hidden Annotation** that will redirect you to PaperSave 6 item viewer, where it allows to add/edit/view the existing PaperSave 6x annotations.

**Note: Note:** This option will appear only when the currently opened item contains any PaperSave 6x annotations and a user has rights to view the annotations.

- Click on  **Join Previous** or  **Join Next** to join the current item with the previous or next item in the list when both items are image type documents, i.e., tiff, pdf, jpg, bmp, gif, etc.

**Note:** To perform the Join operation, you must have any of the below rights:

- Edit content and delete rights on the workflow
- Workflow Administrator
- Super Admin

- Click on  to **Add pages from the scanner** to the current TIFF or PDF file.
- Click on  to **Add pages from a file** to the current TIFF or PDF file.
- Click on  to **Replace the content** of the current document by replacing the document with other document of same mime type.
- Click on  to **Open** the Workflow item in the **Native Viewer** such as Microsoft Word or any other Microsoft Office application respectively.
- Click on  to Use the **version control** feature to control the specific changes made in different versions of the document.

**Note:** Versioning must be enabled for the Document type in the Configuration area. Otherwise, this option will be grayed out (disabled).

- Click on  to **Search** the desired text in the document using the search option.
- Click on  to **View Interrelated Document** that are associated with the current record type.
- Click on  to **Download** the **Workflow Item History** of the selected Workflow item.
- Click on  to **redirect** the Workflow item by changing its step, owner or Workflow.

**Note:** You must be the current owner, super user, or workflow admin to Redirect a Workflow item.

- Click on  to **Delete Document** permanently from the Workflow item list.
- Click on  to **Capture** the **field value** from the document and correct the fields that were not captured properly by OCR.

**Note:** This option is only applicable for documents that went through the OCR process successfully.

- Click on  to **Process OCR** manually on the content and retrieve field values.

**Note:** This option will override the existing values by the values captured using OCR.

- Click on  **Start Side by Side Entry** to perform **Side by Side Entry**.

**Note:** This option will appear only if "**CanAssociateInThisStep**" property is defined as true for the current document's workflow step.

- Click on  to **Learn** the field values captured using OCR from document and auto-fill the fields in the future when the documents of a similar type are added to PaperSave.

**Note:** You can view and delete learned profiles from the **Manage OCR Learned Profiles** section of the settings panel.

- Click on  to set the Workflow related preferences in the **Settings**.

**Tip:** Click [here](#) to learn more from the video about **Settings Panel in Embedded Item Viewer**.

## 2) Thumbnail panel

The Thumbnail panel in the embedded Workflow item viewer displays thumbnails for all the pages in the current document. Hovering on the thumbnail icon shows mini display of the page below the thumbnail icon. Using the thumbnails, the Workflow users can smoothly traverse between the different pages in the current document. You can also change the order of the pages in the submitted/unsubmitted Workflow items directly from the thumbnails in the Workflow item viewer.



Here, there is a  **pencil** icon in thumbnail panel, which enables the content to **Edit mode**. When you right-click on the thumbnail it displays the following options:

**i. Remove selected pages:** This option permanently removes the selected thumbnail page(s) from the thumbnail panel. On successful deletion of page, it displays success toast notification on top-right corner of screen.

**ii. Rotate selected pages right:** This option turns the selected thumbnail page by 90° in the clockwise direction.

**iii. Rotate selected pages left:** This option turns the selected thumbnail page by 90° in the anti-clockwise direction.

**iv. Rotate all pages right:** This option turns all the thumbnail page(s) by 90° in the clockwise direction.

**v. Rotate all pages left:** This option turns all the thumbnail page(s) by 90° in the anti-clockwise direction.

**vi. Split:** This option remains disabled for the Workflow item.

### 3) Image page option toolbar

Image page option toolbar in the embedded Workflow item viewer enables the user to add annotation symbols, drawings on the current document. User can use annotation symbol such as Text, Note, Pen, Ellipse, Line, Arrow, Polygon, Rectangle, Highlighter etc. Click [here](#) to know more about using annotations on the document.

### 4) Document Display

This panel displays the selected page in the current document where user can add annotations.

**Note:** For Microsoft Office documents, when you want to edit a document in the Workflow item viewer or standalone document viewer, it opens in a full-page dialog using the MS Office viewer. After closing, the changes are automatically saved, and the document switches to 'Viewing' mode in PaperSave's Workflow or document viewer, reflecting the updates.

### 5) Document Profile field panel

This panel comprises various Workflow item profile fields where user can edit the profile fields value and save the changes. Click [here](#) to know more about the Document Profile fields panel.

**Tip:** Click [here](#) to learn more from the video about **Document Profile Field Panel**.

## 6) Workflow Item Tracking Panel

This panel comprises the Workflow Conversation and Workflow item history where Workflow Conversation captures the comments entered on executing the Workflow events such as Approve or Reject, and Workflow item History captures the Workflow item information such as previous owner, current owner, changed by, changed on date etc. Click [here](#) for more details.

**Tip:** Click [here](#) to learn more from the video about **Workflow Item Tracking Panel**.

## 7) Workflow Item List Panel

This panel comprises the list of such Workflow items that are not yet submitted to the selected Workflow. Click [here](#) to know more about Workflow Item list Panel.

## 8) Status Bar

The status bar at the bottom of the embedded Workflow item viewer enables you to adjust display related settings such as fit width, fit to size, single page display, horizontal display, etc. Click [here](#) for more details.

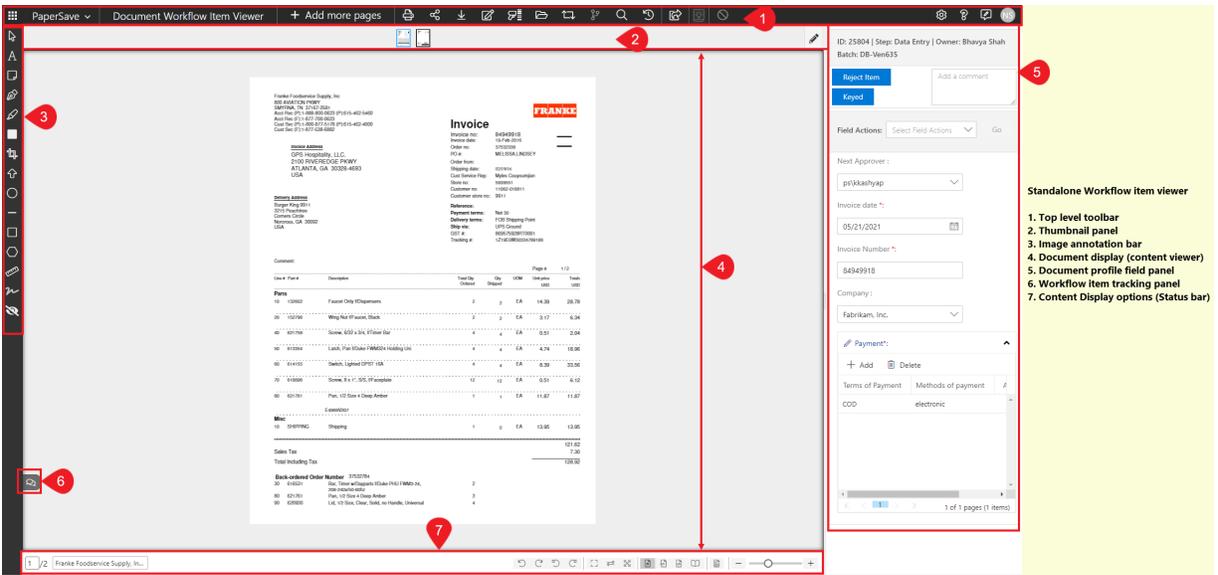
## Standalone Workflow item viewer

The Standalone Workflow item viewer interface enables you to view the Workflow item in an independent window. Based on the PaperSave Workflow Design, if the Email Notifications are configured for the Workflow

user, then whenever an action is performed on the Workflow Item, an Email will be received by the Workflow User(to whom that item is assigned) with a hyperlink to access the Workflow item.

**Tip:** Click [here](#) to learn more about email notification style.

Standalone Workflow item viewer has different sections as shown in the below screen:



The following is the brief description of various sections in Standalone Workflow item viewer as follows:

### 1) Top level Toolbar

Workflow users can access perform following operations on the Workflow item from the Navigation bar

- **+ Add more pages** to the current document.
- **Print** the current Workflow item.
- **Share** the current Workflow item via Email.
- **Download** the current Workflow item.

- **Edit** the **form** for the document if it exists.
- **Add pages from the scanner** to the current TIFF or PDF file.
- **Add pages from a file** to the current TIFF or PDF file.
- You can **Replace** the updated **Content** with the current checked out file.
- You can **open** the current document **in native viewer**.
- Use the **version control** feature to control the specific changes made in different versions of the document.
- You can **Search in document** present in the content viewer.
- You can use **Audit log** to open the Audit Log Viewer with a history of the item based on the settings in the Audit Configuration area.
- **Download** the **Workflow Item History** of the selected Workflow item.
- Set the Workflow related preferences from the **Settings**.

## 2) Thumbnail panel

The Thumbnail panel in the embedded Workflow item viewer displays thumbnails for all the pages in the current document. Hovering on the thumbnail icon shows mini display of the page below the thumbnail icon. Using the thumbnails, the Workflow users can smoothly traverse between the different pages in the current document. You can also change the order of the pages in the submitted/unsubmitted Workflow items directly from the thumbnails in the Workflow item viewer.

## 3) Image page annotation bar

Annotation bar in the Standalone Workflow item viewer enables the user to add annotation symbols, drawings on the current document. User can use annotation symbol such as Text, Note, Pen, Ellipse, Line, Arrow, Polygon, Rectangle, Highlighter etc. Click [here](#) to know more about using annotations on the document.

## 4) Document Display (content viewer)

This panel displays the selected page in the current document where user can add annotations.

**Note:** For Microsoft Office documents, when you want to edit a document in the Workflow item viewer or standalone document viewer, it opens in a full-page dialog using the MS Office viewer. After closing, the changes are automatically saved, and the document switches to 'Viewing' mode in PaperSave's Workflow or document viewer, reflecting the updates.

## 5) Document Profile field panel

This panel comprises various Workflow item profile fields where user can edit the profile fields value and save the changes. Click [here](#) to know more about the Document Profile fields panel.

## 6) Workflow Item Tracking Panel

This panel comprises the Workflow Conversation and Workflow item history where Workflow Conversation captures the comments entered on executing the Workflow events such as Approve or Reject, and Workflow item History captures the Workflow item information such as previous owner, current owner, changed by, changed on date etc. Click [here](#) to know more about Workflow item Tracking panel.

## 7) Status Bar

The status bar at the bottom of the Standalone Workflow item viewer enables the user to adjust display related settings such as fit width, fit to size, single page display, horizontal display etc. Click [here](#) to know more about Status bar in the Standalone Workflow item viewer.

# Acquire Area

This section provides information on all the key features of PaperSave Acquire Area. It educates you on how to get started with the Acquire Area and understand various functionalities offered within the Acquire Area. This section in the User Guide can be used as an ongoing reference for the personnel working on the PaperSave Acquire Area.

## Introduction to Acquire Area

Acquire Area facilitates you to add the scanned or electronic documents that you receive such as invoices, contracts, correspondence, vendor documents, receipts etc. You can add the documents to an existing Workflow using TWAIN compliant scanner, Fujitsu fi-NX series scanner, Check Scanner (for specific scenarios only) or uploading electronic document from your file explorer. You can also add documents to integrated application records, and continue adding items to recently acquired documents.

You can batch the documents by assigning them to a batch, if required. The field values can be defaulted for sets of items as they are scanned or uploaded. The documents go through an Optical Character Recognition (OCR) capture and data extraction process if the OCR is enabled for Workflow. It will auto fill the captured values in the profile field panel upon completion of OCR processing. The fields captured automatically present a confidence score that indicates the likelihood that the system was able to “read” the value properly. This helps you focus on validating values set on fields with a low score.

You can validate the fields automatically captured, set other fields manually, and annotate the documents to highlight important information, redact sensitive data ,write note directly on document pages, and more. Once done, you can submit the acquired items to the selected Workflow or Integrated Application.

Acquire Area offers the following major functionalities:

- **ACQUIRE DOCUMENTS** for the following options
  - **Workflow** document
  - A document related to **specific application record**
  - A document stored to specific **PaperSave document type**
  - **ScanLater/Recapture stack**
  - Acquire **Recently added** documents
  
- **ACQUIRE DOCUMENTS** using below acquisition methods
  - Scan using **TWAIN compliant scanner**
  - Scan using **Fujitsu fi-NX series scanner**
  - Drag items or **select the files to upload** from file explorer
  - Scan using the **Check Scanner** (optional)
  - Generate a **Barcode** to scan later
  
- **VALIDATE DOCUMENTS** before you submit them to the Workflow
  - **Annotate** the document like highlighter, pen, arrow, line, ellipse etc.
  - **Add** pages, Split, Join and Rotate the pages for unsubmitted items in thumbnail view.
  - **Review** and **Edit** the **Profile fields** in the item viewer.
  - Access the **unsubmitted Workflow items**
  
- **SUBMIT DOCUMENTS** to the desired Workflow/Integrated Application

The following topics will help you explore the detailed features associated with each step in the Acquire Area:

- [Getting Started with Acquire Area](#)
- [Selecting the type of document to acquire](#)
- [Acquiring Workflow documents](#)
- [Acquiring documents for Integrated Application record](#)
- [Acquiring PaperSave documents](#)
- [A ScanLater/Recapture Stack](#)
- [Acquiring recently added documents](#)

## Getting Started with Acquire Area

This guide contains details on all the functions and uses of the Acquire Area. It is organized into sections that deeply describe options available around each major function in the Acquire Area.

The best place to start learning is by going through the Quick Walkthrough of the Acquire Area and watching all of the “how-to” video tutorials presented for each step. This will give you a good overview of the Acquire Area’s typical flow.

Watch the [video](#) to learn how to get started with Acquire Area.

## Selecting the type of document to acquire

This is the first screen that appears when you open the Acquire area. You need to select the type of document you wish to acquire from the following options as shown below:

What kind of document are you acquiring?

Select from these areas:

A workflow document

A document related to a specific application record

A document stored to a specific PaperSave document type

A ScanLater/Recapture stack

Select from one of these recently chosen items:

Records	Drop points	Record types
<p><b>Blackbaud Enterprise CRM - Records - Constituent - QAUAT.BBInfinity</b></p> <p><input type="radio"/> 8-10000483-Group-Household-Jennifer and Spencer Kovalak</p> <p><input type="radio"/> 8-10000141-Individual-Joseph Abrahms</p> <p><b>Blackbaud Enterprise CRM - Transactions - Revenue - QAUAT.BBInfinity</b></p> <p><input type="radio"/> 8-10000141-Joseph Abrahms-Recurring gift-23.00-Cash-2023-08-24</p> <p><b>Blackbaud's The Raiser's Edge - Records - Appeal - Blackbaud Demo</b></p> <p><input type="radio"/> NEWSLETTER-Annual-250000.00-Annual Newsletter</p> <p><b>Blackbaud's The Raiser's Edge - Records - Action - Blackbaud Demo</b></p>	<p><input type="radio"/> BBCRM Gift OCR Barcode Separator - BBCRM Gift OCR</p> <p><input type="radio"/> NS GP Non PO Payment AE SWIFT - Incoming items - NS GP Non PO Payment AE SWIFT</p> <p><input type="radio"/> barcode - DM Simple WF</p> <p><input type="radio"/> DM WF - Incoming item - DM Simple WF</p> <p><input type="radio"/> before field loadevent - NS GP Invoice Email Notification with OnEnter</p>	<p><b>Blackbaud Enterprise CRM - Records</b></p> <p><input type="radio"/> Constituent</p> <p><b>Blackbaud's The Raiser's Edge - Records</b></p> <p><input type="radio"/> Action</p> <p><input type="radio"/> Event</p> <p><b>Blackbaud Enterprise CRM - Transactions</b></p> <p><input type="radio"/> Revenue</p> <p><b>PaperSave - General</b></p> <p><input type="radio"/> TransactionType_212_General_56</p>

The following is the brief description for the available options:

- **A Workflow Document:** Select this option to add documents to a desired Workflow using the available drop points.
- **A document related to a specific application record:** Select this option to add documents to desired records of an Integration application.
- **A document stored to a specific PaperSave document type:** Select this option to add documents to a document type in PaperSave.
- **A ScanLater/Recapture stack:** Select this option to add a stack of documents to previously generated ScanLater coversheets.

**Note:** "A ScanLater/Recapture stack" is a PaperSave Add-On Module. If you do not see this feature as an option in Acquire Area homepage, then please contact [sales@papersave.com](mailto:sales@papersave.com) for more information on this Product.

- **Select from one of these recently chosen items:** Select this option to continue adding documents to recently acquired documents.

## Acquiring Workflow documents

You can acquire the documents to already available Workflow by using supported File Capture options such as "Scan using **Fujitsu fi-NX**", "Scan using **TWAIN compliant scanner**", Scan using **Check Scanner** (for specific scenarios only) or "Drag items here or select the files to **upload** from **file explorer**".

### Select the type of method for acquiring the document

1) Select **A Workflow document** in the type of document you want to acquire menu and click on the **Next** button in the lower right corner.

A workflow document

A document related to a specific application record

A document stored to a specific PaperSave document type

A ScanLater/Recapture stack

Select from one of these recently chosen items:

Records	Drop points	Record types
<b>Blackbaud Enterprise CRM - Records - Constituent - QAUAT.BBInfinity</b> <input type="radio"/> 8-10000483-Group-Household-Jennifer and Spencer Kovalak <input type="radio"/> 8-10000141-Individual-Joseph Abrahms	<input type="radio"/> BBCRM Gift OCR Barcode Separator - BBCRM Gift OCR <input type="radio"/> NS GP Non PO Payment AE SWIFT - Incoming items - NS GP Non PO Payment AE SWIFT <input type="radio"/> barcode - DM Simple WF <input type="radio"/> DM WF - Incoming item - DM Simple WF <input type="radio"/> before field loadevent - NS GP Invoice Email Notification with OnEnter	<b>Blackbaud Enterprise CRM - Records</b> <input type="radio"/> Constituent
<b>Blackbaud Enterprise CRM - Transactions - Revenue - QAUAT.BBInfinity</b> <input type="radio"/> 8-10000141-Joseph Abrahms-Recurring gift-23.00-Cash-2023-08-24		<b>Blackbaud's The Raiser's Edge - Records</b> <input type="radio"/> Action <input type="radio"/> Event
<b>Blackbaud's The Raiser's Edge - Records - Appeal - Blackbaud Demo</b> <input type="radio"/> NEWSLETTER-Annual-250000.00-Annual Newsletter		<b>Blackbaud Enterprise CRM - Transactions</b> <input type="radio"/> Revenue
<b>Blackbaud's The Raiser's Edge - Records - Action - Blackbaud Demo</b> <input type="radio"/> Phone Call-Thank You-Sidney L Prescott-2008-08-01-Continuous		<b>PaperSave - General</b> <input type="radio"/> TransactionType_212_General_56

Set as Default

**Next**

### Select a Workflow Drop point

1) Select the desired Workflow from the list and click on the > arrow to view the related Drop points.

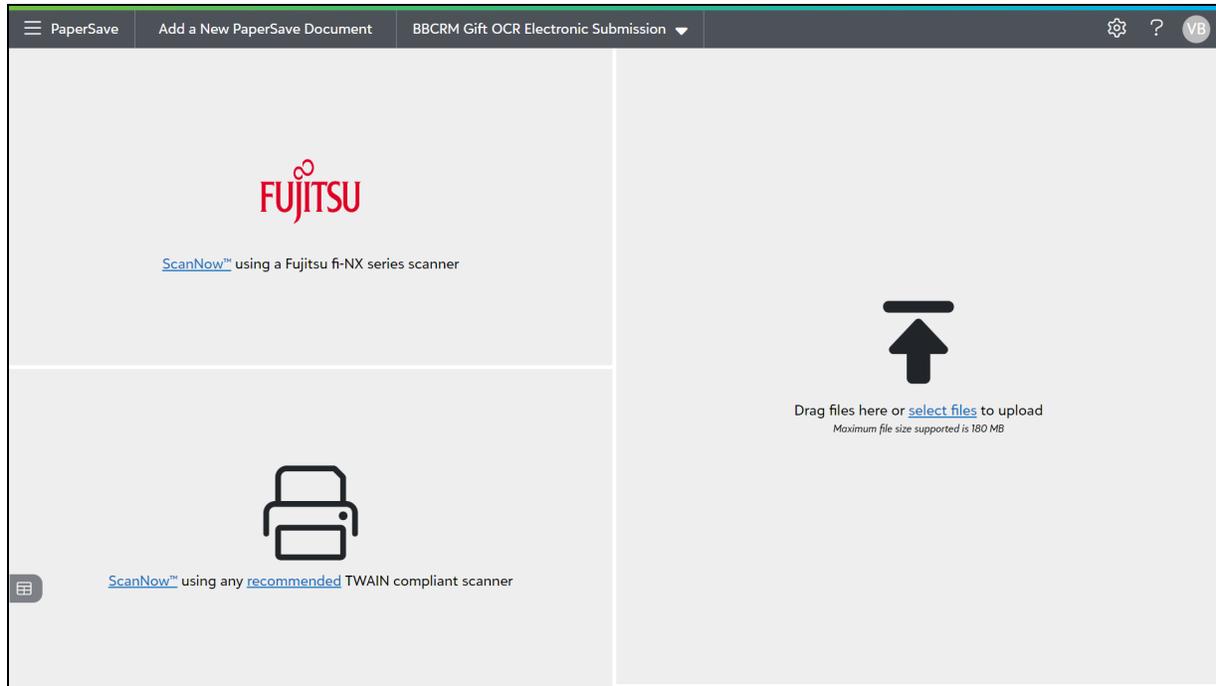
2) Select a desired Drop point from the list using which you wish to acquire Workflow item and click on **Go**, as shown in the below screen.

**WORKFLOW DOCUMENT**

- > B C Purchase Invoice and Payments Automation
- ∨ BBCRM Gift OCR
  - BBCRM Gift OCR Barcode Separator
  - BBCRM Gift OCR Electronic Submission**
  - BBCRM Gift OCR Image Page Separator
  - BBCRM OCR
  - Test Drag and Drop
- > BBCRM Gift OCR With Check Process
- > BC Purchase Invoice Entry

**GO**

3) You will see the file capture options panel with the available options to add documents to the selected Workflow.



The following are the topics covered to Acquire Workflow documents:

- [File capture options panel for Workflow documents](#)
- [Setting Batch and Field Defaults](#)
- [Unsubmitted Item list panel](#)
- [Validating and submitting the Workflow documents](#)

## File capture options panel for Workflow documents

You can select any of the following file capture options to acquire the Workflow documents in PaperSave:

- [ScanNow using TWAIN compliant scanner](#)
- [ScanNow using Fujitsu fi-NX series scanner](#)
- [Drag items or select the files to upload](#)
- [ScanNow using Check scanner](#)

## **File Capture options panel top level toolbar options**

Watch the [video](#) to learn about the Top level toolbar in the File Capture Options Panel in Acquire Area.

## **Settings in the file capture options panel**

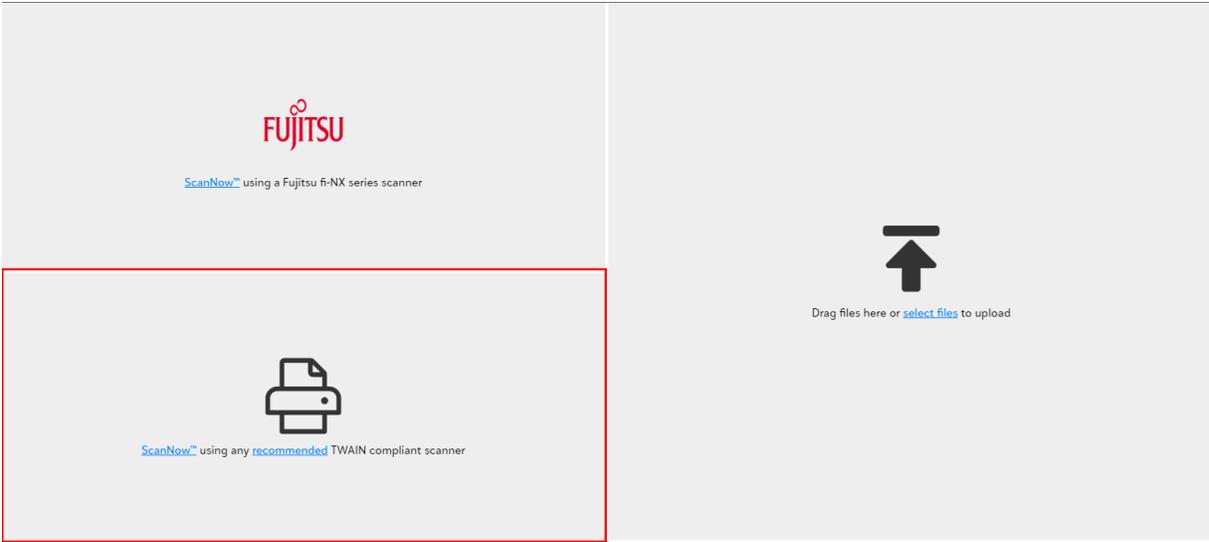
Watch the [video](#) to learn about the Settings in the file capture options panel in Acquire Area.

Watch the [video](#) to learn about the Unsubmitted item list in the Acquire Area.

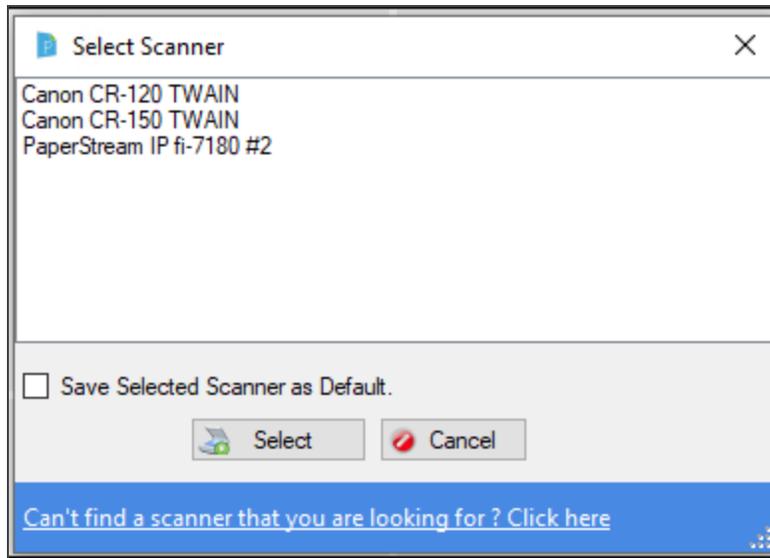
## ScanNow using TWAIN compliant scanner

Watch the [video](#) to learn about how to scan documents using TWAIN scanner.

1) Click on the "[ScanNow™](#) **using any recommended TWAIN compliant scanner**" option in the file capture options panel to add a document from a TWAIN compliant scanner as shown below.



2) You shall be prompted to pick a scanner from the available list of scanners upon clicking **ScanNow™ using recommended TWAIN compliant scanner**.



3) You can define your favorite scanner as default so that you do not have to choose it again next time.

**Note:** It may occur that you have installed drivers of a particular scanner, but are not connected to the scanner. In such cases, the scanner might be displayed in the list as it detects the installed drivers and shows the same in the list.

**Tip:** The app will prompt you to download and install the PaperSave Windows Client upon scanning for the first time. You must download it as per the given instructions to scan documents using the TWAIN scanner.

**Note:** The scanning utility and the TWAIN scanning only works on Windows operating system, Whereas Scanning on a Mac can only be accomplished with the Fujitsu fi-NX series scanner option.

The ideal configuration for PaperSave supported TWAIN Compliant Scanner is as shown below:

**For Output Type:** PDF

<b>16 GB RAM</b>			
<b>Page Side</b>	<b>DPI</b>	<b>Scan Type</b>	<b>Total Pages</b>
<b>Single</b>	200&300	Black & White/Color/Gray	Upto 600
<b>Duplex</b>	200&300	Black & White/Gray	Upto 600
	200	Color	Upto 200
	300	Color	Upto 40

<b>8 GB RAM</b>			
<b>Page Side</b>	<b>DPI</b>	<b>Scan Type</b>	<b>Total Pages</b>
<b>Single</b>	200&300	Black & White/Color/Gray	Upto 600

<b>Duplex</b>	200&300	Black & White	Upto 600
	200	Color	Upto 200
	300	Color	Upto 40
	200	Gray	Upto 400
	300	Gray	Upto 120

**For Output Type: TIFF**

<b>16 GB RAM</b>			
<b>Page Side</b>	<b>DPI</b>	<b>Scan Type</b>	<b>Total Pages</b>
<b>Single</b>	200&300	Black & White/Color/Gray	Upto 600
<b>Duplex</b>	200&300	Black & White/Color/Gray	Upto 600

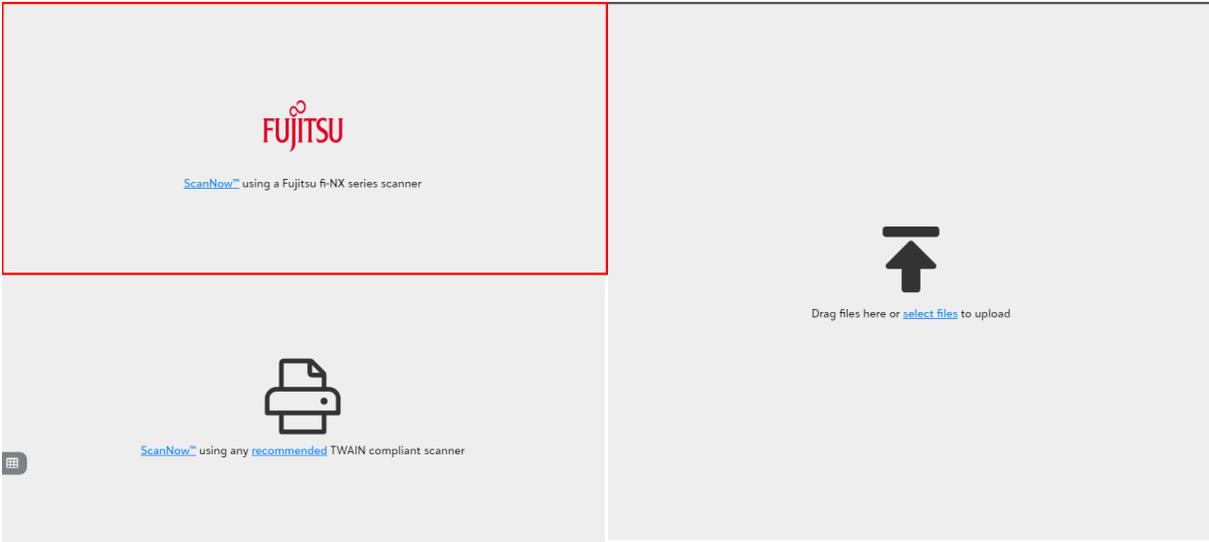
<b>8 GB RAM</b>			
<b>Page Side</b>	<b>DPI</b>	<b>Scan Type</b>	<b>Total Pages</b>
<b>Single</b>	200&300	Black & White/Color/Gray	Upto 600
<b>Duplex</b>	200&300	Black & White/Color/Gray	Upto 600

**Note:** Once you acquire the item, you can validate and submit the unsubmitted document to the Workflow. Click [here](#) to learn in detail about validating and submitting the documents.

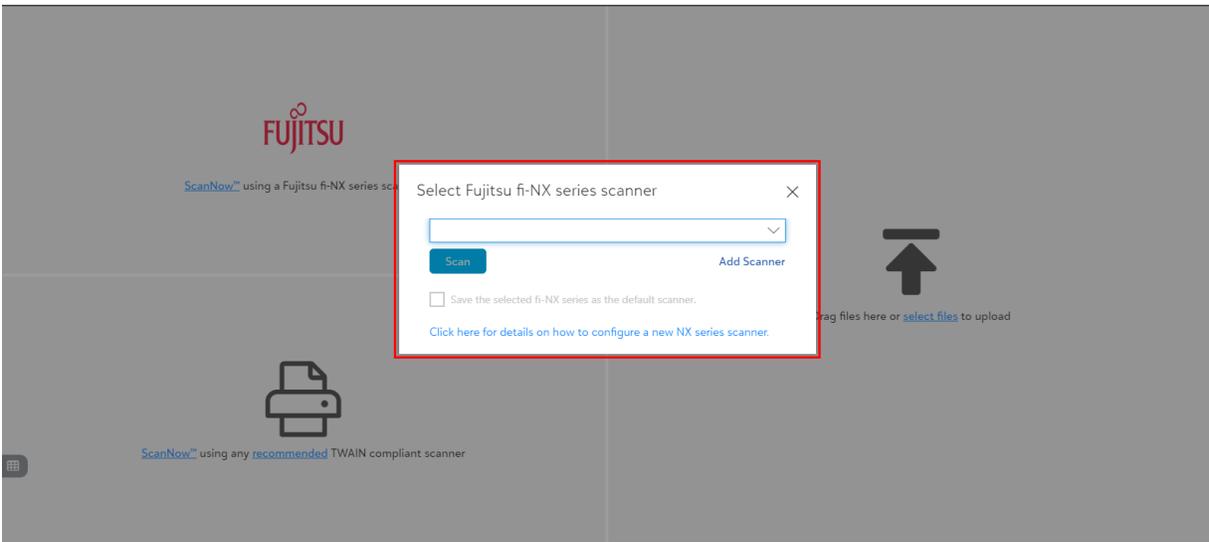
**ScanNow using Fujitsu fi-NX scanner**

Watch the [video](#) to learn how to scan the documents using Fujitsu fi-NX scanner to add to the Workflow.

1) Click on the "**Scan Now™ using Fujitsu fi-NX series scanner**" in the file capture options panel to add a document from a Fujitsu fi-NX series scanner as shown below.



2) You will be prompted to pick a scanner from the available list of scanners upon clicking "**Scan Now using Fujitsu fi-NX scanner**". Select a scanner from the available list of scanners to proceed scanning as shown below:



3) Click on "**Add Scanner**" to add a new Fujitsu fi-NX series scanner to the scanner list by entering required details.

Add Fujitsu fi-NX series scanner

Serial Number

Display Name

Save

**Tip:** See the instructions to configure new fujitsu fi-NX series scanner by clicking on the link "[click here for details on how to configure a new NX series scanner](#)" at the bottom part of the select Fujitsu scanner dialog.

**Note:** Once you acquire the item, you can validate and submit the unsubmitted document to the Workflow. Click [here](#) to learn in detail about validating and submitting the documents.

## Drag files here or select files to upload

Watch the [video](#) to know how to acquire a Workflow document by using "**drag files here or select files to upload**" from file explorer.

PaperSave provides you the following two options to acquire by uploading electronic documents:

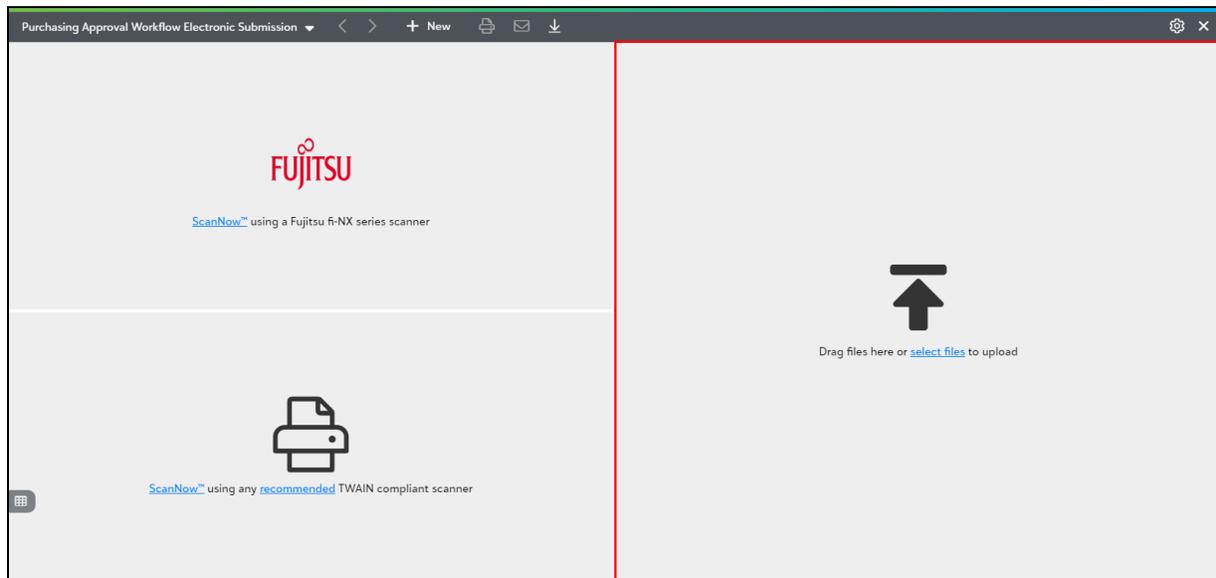
- Drag one or more documents from your file explorer to drag files tile in the file capture options panel.
- Click on "**select files**" (from within the Drag files tile) to select one or more documents through your file explorer as shown below.

### **Lockbox Processed file:**

PaperSave now provides add-on functionality to split the checks within **Lockbox processed** file\* for the drop points with separator type as "Check Separator". To make this functionality work properly, you need to configure certain settings within the [Miscellaneous Settings](#).

**Note:** \*Please contact support@pairsoft.com to purchase/enable this feature if not yet purchased.

**Warning:** For the PDF files, the check separator mechanism only works if it is a searchable PDF and is a "Lockbox Processed" file.



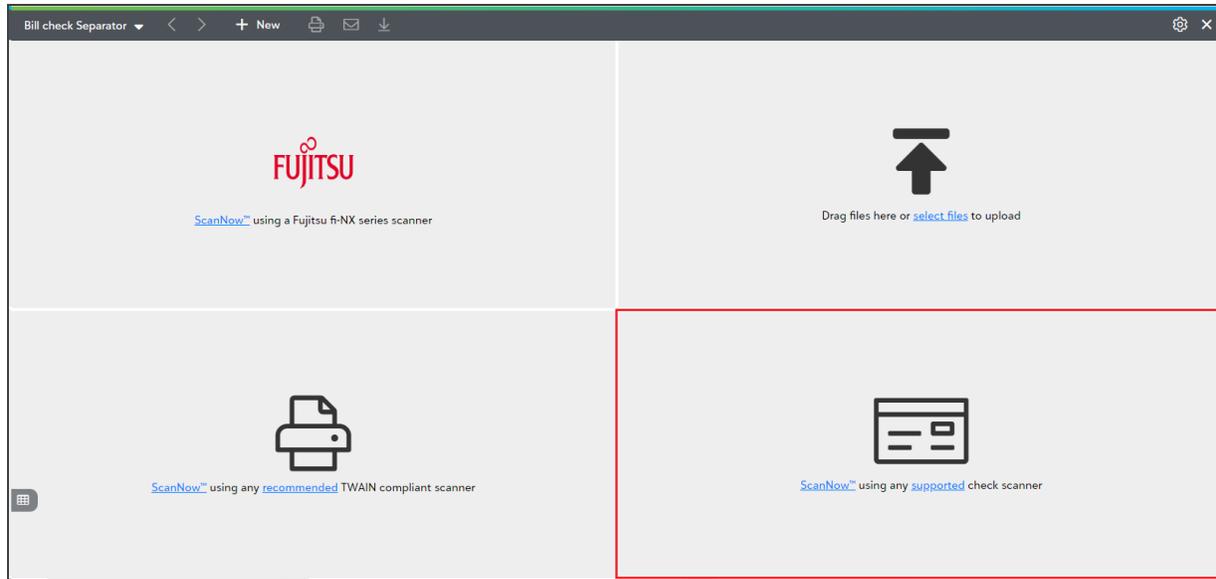
**Note:** Once you acquire the item, you can validate and submit the unsubmitted document to the Workflow. Click [here](#) to learn in detail about validating and submitting the documents.

## ScanNow using Check Scanner

Watch the [video](#) to know how to acquire checks using the check scanner.

**Note:** To view the Check Scanner acquisition method, you need a drop-point with the separator type set as **check separator type**.

- 1) Click on the "[ScanNow™](#) **using any supported check scanner**" option in the file capture options panel to add a document from a check scanner as shown below.



2) You will be prompted to pick a scanner from the available list of scanners upon clicking "ScanNow™ using any supported check scanner".

**Tip:** The app will prompt you to download and install the PaperSave Windows Client upon scanning for the first time. You must download it as per the given instructions to scan documents using the check scanner.

**Note:** Once you acquire the item, you can validate and submit the unsubmitted document to the Workflow. Click [here](#) to learn in detail about validating and submitting the documents.

## Set Batch and Field Defaults

Through the process of adding items using either a scanner or uploading them from your file explorer, the area will prompt you with a dialog titled: '**Set Batch & Field Defaults**'. This dialog lets you add the items you are acquiring to a new or existing batch as well as set default values for profile fields as shown below.

**Set Batch & Field Defaults** ✕

**Batch:**  ▼ [Auto generate](#)

**▲ Set defaults for this acquisition**

Vendor :

Invoice Date :

Invoice Amount :

Invoice Number :

Don't ask me again

## Batch

This allows you to add the documents being acquired to a specific batch (group).

- You can enter that batch in **manually** or you can select it from the drop-down list to add the items to an **existing batch**. This list shows all the batches that currently have unsubmitted items.

- You can enter that batch value manually to add the document to a **new batch**.
- Click on '**Auto generate**' link to assign an auto-generated number to the Batch.

**Note:** If you keep the batch field empty, then your items will be added without a batch. The details of the batch for each item will be displayed in the batch column in the slide out panel.

**Note:** The maximum character limit for manually entering the Batch details is 30.

The special characters can be included in the batch name:

Special characters to be considered:

- ~ ` ! @ # \$ % ^ & \* ( ) \_ - + = { } | [ ] \ ; : " ' < > ? , . /

Spanish characters to be considered:

- á, é, í, ó, ú, ñ, ü, ç, j

French characters to be considered:

- ë, ï, ü, à, è, ù, â, ê, î, ô, û, é, Ç

## Setting defaults for this Acquisition

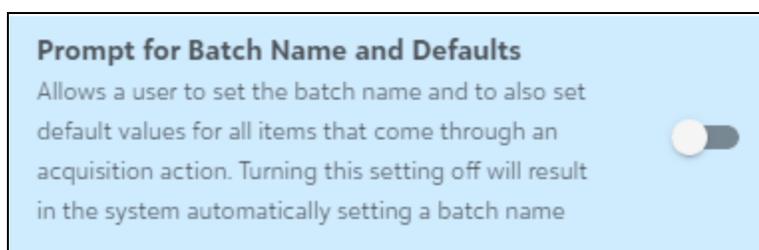
You can set default values for Profile fields on single or group of items that you acquire.

**Note:** The default values loaded in the profile fields will be driven by **Drop points defaults first**. If the drop point defaults are not set, then it will consider **Document type defaults** or **Workflow field defaults**. Otherwise, the profile fields will be empty and user can manually set the individual values.

## Don't Ask me again

You can turn off the batch prompt by checking off "**Don't ask me again**" and clicking on "**OK**". your preference will be saved for subsequent acquisitions and you will no longer be prompted to add a batch or for the opportunity to set default values for fields being acquired.

**Tip:** If you need to change the preference and turn the prompt back on, then you can do so from the settings panel by turning the toggle switch labeled: "Batch and Defaults" to "**ON**" as shown in the below screen.

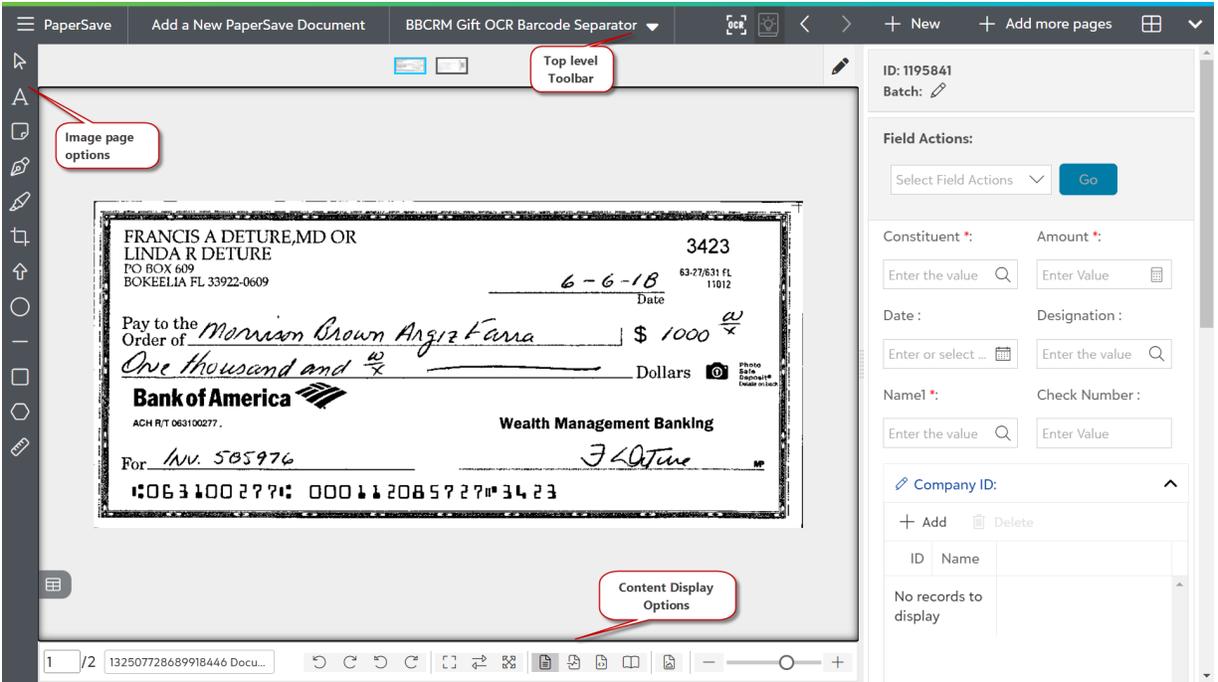


## Validating and submitting the Workflow documents

Unsubmitted Workflow items can be worked on from the item list and opened in the item viewer once they are acquired successfully. Various operations can be performed on Workflow items while working with them in the item viewer such as editing fields, adding annotations, page manipulation, submit one or more unsubmitted items, etc.

Watch the [video](#) to learn how to validate the Workflow item before submitting it to the Workflow.

The below screen displays the various options available in the Item viewer for validating the Workflow item.



The following is the description of various options available to validate the Workflow item in the Workflow Area:

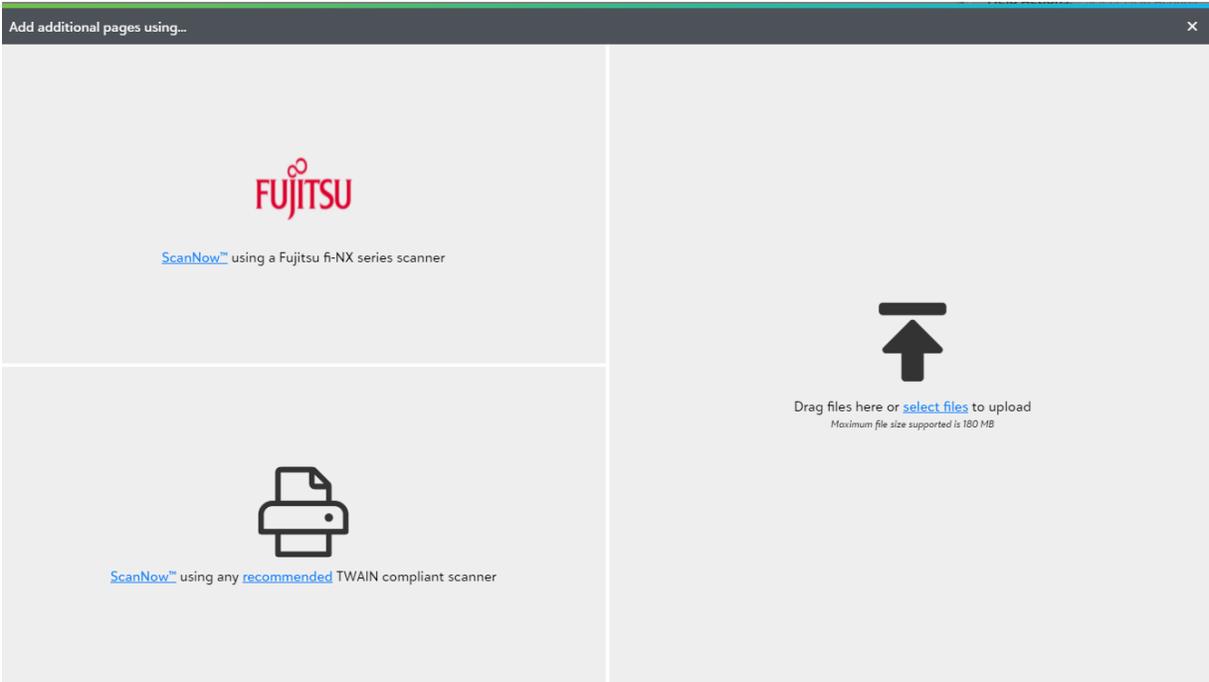
**1) Top level toolbar options in the Item viewer for unsubmitted items:**

The following are the options in the top level toolbar of item viewer for unsubmitted items:

- : Click on this option to navigate to the previous unsubmitted item. It will be disabled if there is no previous item.
- : Click on this option to navigate to the next unsubmitted item. It will be disabled if there is no next item.
- : Click on this option to switch to File capture options panel to acquire a new document.

 Add more pages

: Click on this option to add more pages to the current document. clicking on this option will display the following "Add additional pages" prompt.



: This option will navigate you to the Page Manipulation View for unsubmitted items in the Workflow Area where you can perform various operations such as cut, copy, paste, rotate, etc. on the unsubmitted items. Click [here](#) to know more about Page Manipulation View.



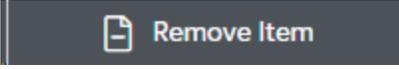
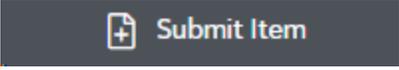
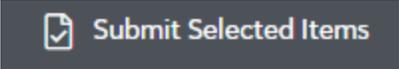
: Click on this option to print the current document.



: Click on this option to share the item via email. Currently, this feature is not yet implemented.



: Click on this option to download the current document.

- : Click on this option to process OCR on the items. Using this option will override the current profile field values.
- : Click on this icon to use the OCR learn by fingerprint or learn by key feature.
- : Click on this option to discard the current item.
- : Click on this option to submit the current unsubmitted item.
- : Click on this option to submit items selected in the unsubmitted item list.

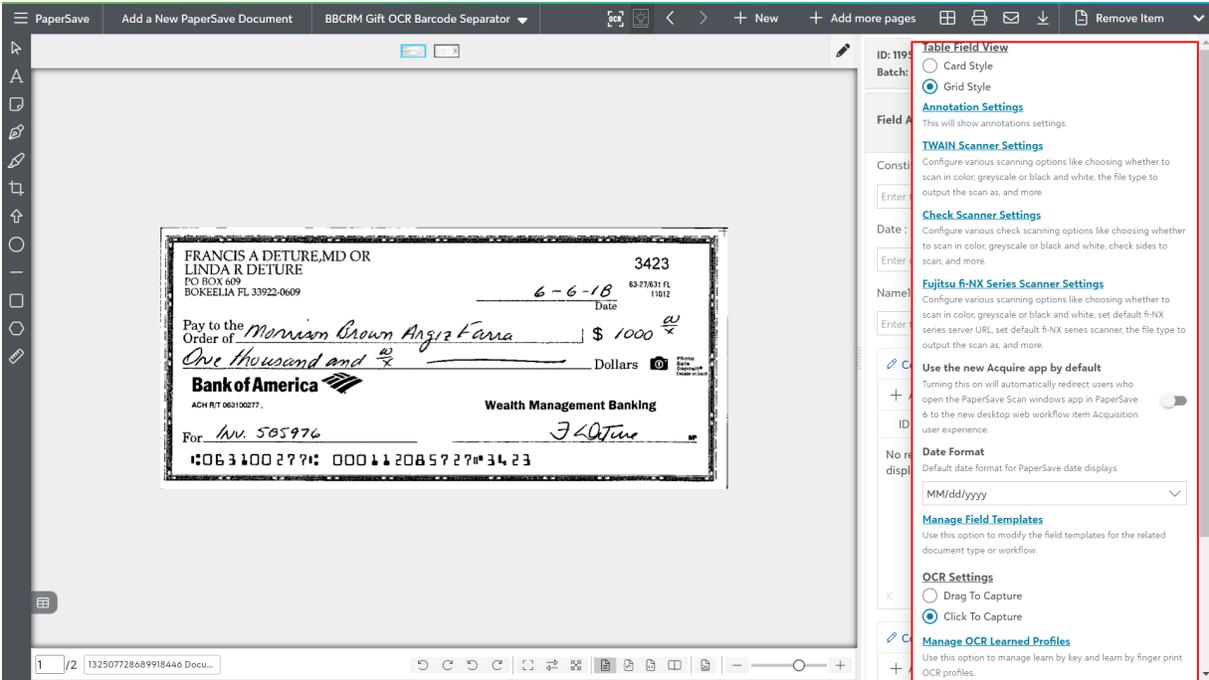
## 2)Using Image page options(Annotations) for Unsubmitted items

You can add different annotations using the Image page options toolbar on the left-hand corner of the screen. Click [here](#) to know more about it.

## 3)Item Viewer Settings panel for unsubmitted items

Watch the [video](#) to learn the Item Viewer Settings options for unsubmitted items.

-  : Click on this option to define your preferences in the Settings panel in Item viewer for unsubmitted items:



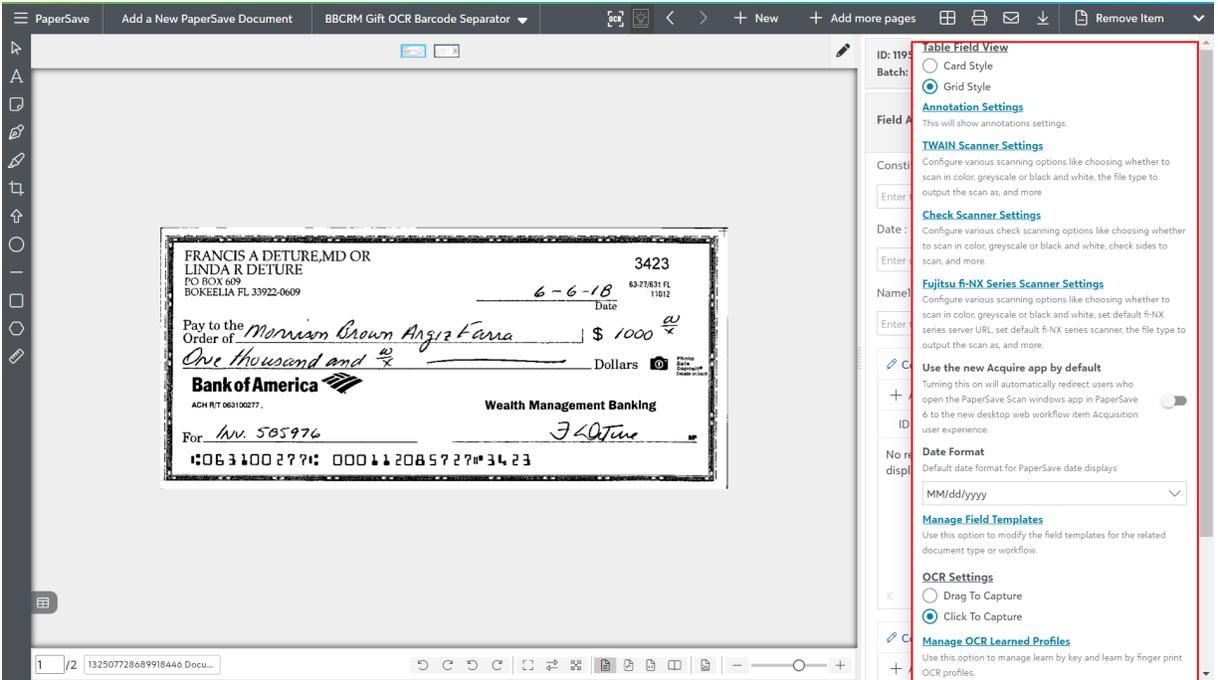
The following is the brief description of various preferences in the Settings panel:

#### a) **Table Field View**

PaperSave offers a widget with two different user interfaces (card style and grid style) for the table type fields in the document profile field panel. Card style is set as the default option.

a) **Card Style** : It switches the "table type field" widget to a card style view.

- Select the Card style option in the Table field view Settings, as shown below:

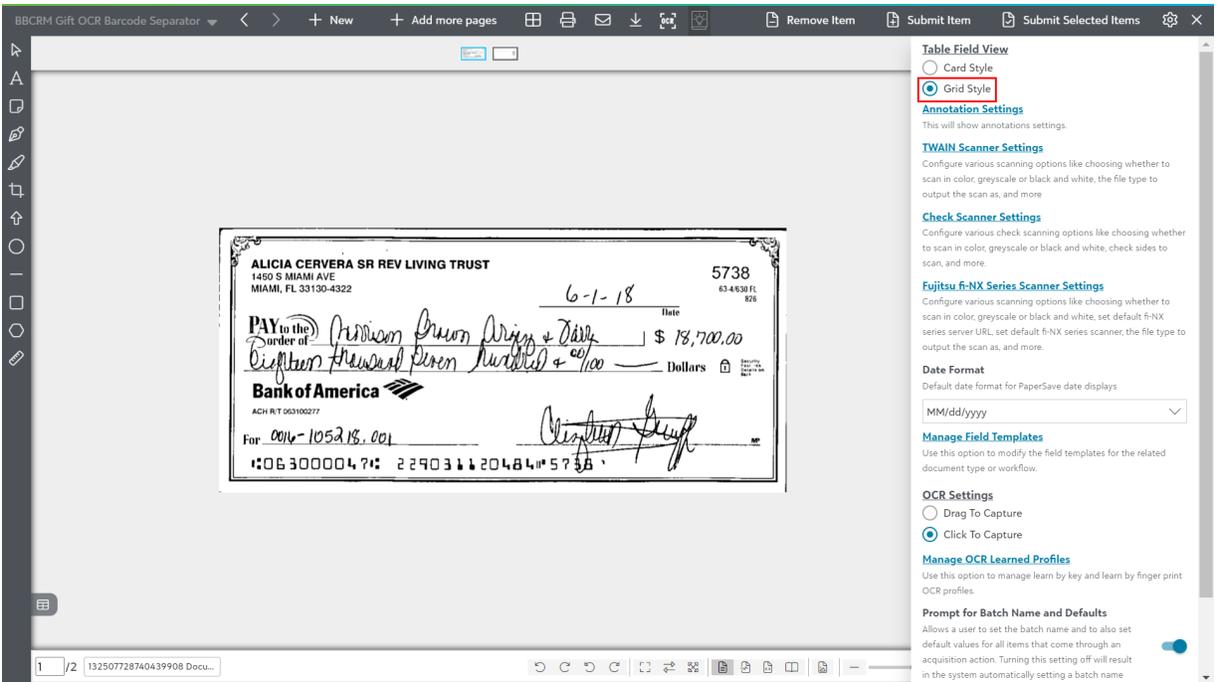


- You will see "**Card Style view**" for the Table type fields in the document profile field panel while editing the field as shown below.

The screenshot shows a software interface for processing checks. The main area displays a check from Bank of America, dated 6-6-18, for \$1000. The check is payable to Morrison Crown Anziz Ferra. The form on the right side of the interface has a 'Company ID' field highlighted with a red box. This field is currently empty and shows 'No records to display'. The form also includes fields for Constituent, Amount, Date, Designation, Name, and Check Number. The interface includes a top navigation bar with options like 'New', 'Add more pages', 'Remove Item', 'Submit Item', and 'Submit Selected Items'. The bottom status bar shows '1 / 2' and '132507728689918446 Docu...'.

b) **Grid Style:** It switches the "table type field" widget to Grid style view.

- Select the Grid style option in the Table field view Settings as shown below:



- You will see "**Grid Style view**" for the Table type fields in the document profile field panel as shown below.

The screenshot displays a software interface for document processing. The main window shows a check from Bank of America, dated 6-6-18, for \$1000.00, payable to Morrison Crown Anziz Ferra. The check includes the bank name, logo, and routing number 1063100277. The interface also features a sidebar with various tool icons and a top menu with options like 'New', 'Add more pages', 'Remove Item', 'Submit Item', and 'Submit Selected Items'. On the right side, there is a data entry form with fields for 'Constituent', 'Amount', 'Date', 'Designation', 'Name', and 'Check Number'. A 'Company ID' dropdown menu is open, showing a table with columns for 'ID' and 'Name', and a message 'No records to display'. The table is currently empty.

ID	Name
No records to display	

## b) Annotation Settings

This Setting option enables you to adjust the following preferences for each annotation tool in the Workflow Item Viewer.

[← Back To Settings](#)

**TWAIN Scanner Settings**

Scan Type:

Page Sides to Scan:

DPI:

Time in seconds before assuming scanning is complete

Use this to set time in seconds before PaperSave assumes it is no longer receiving pages from the scanner. Once this time has passed after receiving a page, then PaperSave will consider the scanning of a specific stack to be complete. Configure this to a higher number if the speed of your scanner and or internet connection heavily fluctuates. Be advised that the longer you set this time to be, the slower scanning will feel.

Show TWAIN driver settings before scanning

Turning this on will prompt users with the native TWAIN settings panel of the scanner they are using. This will allow them to control scanner specific settings prior to scanning.

Use a default scanner

Setting this off will clear the default scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

Prompt to continue scanning

When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

**Text, Note:** Select font, font size, default text, vertical and horizontal alignment.

**Pen, Circle, Line, Polygon, and Arrow:** Select the thickness and color.

**Highlighter:** Select the color.

**c) Twain Scanner Settings**

This Setting option enables you to configure the following scanner related preferences as shown below:

[← Back To Settings](#)

### **TWAIN Scanner Settings**

Scan Type:	Black and White	▼
Page Sides to Scan:	Single Side(Simplex)	▼
DPI:	200	▼

#### **Time in seconds before assuming scanning is complete**

Use this to set time in seconds before PaperSave assumes it is no longer receiving pages from the scanner. Once this time has passed after receiving a page, then PaperSave will consider the scanning of a specific stack to be complete. Configure this to a higher number if the speed of your scanner and or internet connection heavily fluctuates. Be advised that the longer you set this time to be, the slower scanning will feel.

3	▼ ▲
---	-----

**Show TWAIN driver settings before scanning**

Turning this on will prompt users with the native TWAIN settings panel of the scanner they are using. This will allow them to control scanner specific settings prior to scanning.

**Use a default scanner**

Setting this off will clear the default scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

**Prompt to continue scanning**

When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

- **Scan Type**

Black & White, Gray Scale, Color

**Tip:** We highly recommend using the **Black and White** scan option as it uses the least amount of disk storage space and yields the fastest processing.

- **Page Sides to Scan**

- Single Side
- Both sides

**Note:** If your scanner supports skipping or ignoring blank page, then we recommend you setting the Page Scan options to Scan **Both sides**(Duplex).

- **DPI ( Dots per inch)**

The smaller the DPI number, the less sharp the image will appear. However, size of the image will increase as you increase the DPI number.

**Note:** We recommend that you use 300 DPI.

- **Show TWAIN driver settings before scanning**

Turning this on will prompt users with the native TWAIN settings panel of the scanner they are using. This will allow them to control scanner specific settings prior to scanning.

- **Use a default scanner**

Setting this off will clear the default scanner chosen by you previously, and you will be prompted for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

- **Prompt to continue scanning**

When this option is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

d) **Check Scanner Settings**

This Setting option enables you to configure the following check scanner related preferences as shown below:

### Check Scanner Settings

Scan Type:  

Page Sides to Scan:  

Double Feed Detection:

Prompt to continue scanning

When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

Enable Rear Endorser:

Endorsement type\*:  

Endorsement Line 1\*:  

Endorsement Line 2:

Endorsement Line 3:

Endorsement Line 4:

Endorsement Line 5:

- **Scan Type**

Black & White, Gray Scale, Color

**Tip:** We highly recommend you to use Black and White scan option as it uses the least amount of disk storage space and yields fastest processing.

- **Page Sides to Scan**

- Single Side (Simplex)
- Both Sides

**Note:** We recommend you setting the Page Scan Options to Scan Both Sides (Duplex) if your scanner supports skipping or ignoring blank page.

- **Prompt to continue scanning:**

When this option is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

- **Enable Rear Endorser :**

This option allows the user to enable and disable the rear endorsement for the checks. The endorsement can be virtual or physical, depending on your check scanner.

- **Endorsement Type:**

This option will define if the rear endorsement is printed on the physical check or on the image of the check in the gift item document. You can select one or both options.

- **Endorsement Line 1 to Endorsement line 5:**

This sets the lines you want printing (virtually or physically) on the back of checks. This option requires on the Enable Rear Endorser option to be turned **on**.

**Note:** Your check scanner must support this feature for using Rear endorser options.

#### e) Fujitsu fi- NX Series Scanner Settings

This Setting option enables you to configure the following Fujitsu fi-NX scanner related preferences, as shown below:

#### Fujitsu fi-NX Series Scanner Settings

Scan Type:  

Page Sides to Scan:  

Use a default fi-NX scanner

Setting this off will clear the default fi-NX scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

Prompt to continue scanning

When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

- **Scan Type**

Black & White, Gray Scale, Color

**Tip:** We highly recommend you to use **Black and White** scan option as it uses the least amount of disk storage space and yields fastest processing.

- **Page Sides to Scan**

- Single Side
- Both sides

**Note:** We recommend setting the page scan options to scan both sides (Duplex) if your scanner supports skipping or ignoring blank page.

- **Use a default fi-NX scanner**

Setting this off will clear the default fi-NX scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

- **Prompt to continue scanning:**

When this option is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

f) **Use the new Acquire app by default:** Turning this on will automatically redirect users who open the PaperSave Scan windows app in PaperSave 6 to the new desktop web workflow item Acquisition user experience.

g) **Date Format**

This option enables the user to change the default date format. By default it is MM/dd/yyyy.



**Date Format**  
Default date format for PaperSave date displays  
MM/dd/yyyy

You can define the desired preferences to any of the following date format options.

- MM-dd-yyyy
- MM/dd/yyyy
- dd-MM-yyyy
- dd/MM/yyyy
- yyyy-MM-dd

Once any of the above date format is selected, it should save/update the new date format for that user upon exiting of the Settings menu.

#### h) **Manage Field Templates**

User this option to modify the field templates for the related document type or workflow.



#### i) **OCR Settings:**

This Setting option enables you to configure OCR-related preferences in the Workflow item viewer, as follows. Set the preference to use the drag or click action to correct the profile fields values on items processed by OCR.



- **Drag to Capture:** Choose this option to capture the value from the document and drag that selected value to desired document profile field.
- **Click to Capture:** Choose this option to capture the value from the document and click on the desired document profile field to auto-fill the captured value.

**Note:** The Click/Drag to Capture options will only be applicable for documents processed by OCR.

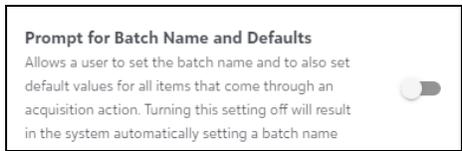
### j) **Manage OCR Learned Profiles**

You can use this option to manage the OCR learn by key and learn by finger print OCR profiles.



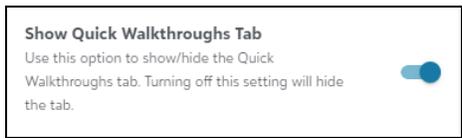
### k) **Prompts for Batch Name and Defaults**

Enabling this option turns on the prompt for batch and field defaults. The prompt is on by default but can be turned off by selecting the checkbox labeled "**Don't ask me again**" in the "**Set Batch and Field Defaults**" dialog. Turning this setting off will result in the system automatically setting a batch name. Similarly, Setting the option **ON** restores the prompt.



### l) **Show Quick Walkthrough Tab**

Use the toggle button to show/hide the **green** Quick walkthroughs on the screen.



### m) **Use Client-Side PDF Rendering**

"Use Client-Side PDF Rendering" option within the item viewer's settings panel which on enabling helps to load the PDF document faster than the Server-side rendering. For more details, refer to [Client-Side Rendering](#).

**Use Client-Side PDF Rendering**

Use this setting for any PDF where you experience rendering issues. turning this setting to ON will render the PDF documents faster. however, some PDF files cannot be rendered correctly using this setting. this setting will be set for the current document only.



## Review and edit Profile fields

The field panel is located at the right-side of the item viewer with various fields related to document type or Workflows. The field data can be automatically captured via Optical Character Recognition (OCR) technology, looked up against values in Dynamics GP's database (using SQL) or entered in manually. Fields that are captured via OCR will show a percentage value in parentheses next to the field label. This percentage represents the confidence that the OCR engine has in the value it captured. The more exact the match, the higher the confidence score.

It is recommended that you double-check and validate all values captured by OCR. Still it would be best to focus on validating all the values with a low confidence score. If the auto field values are incorrect or inaccurate, then you can edit such profile fields manually or use the drag to capture tool to automatically select text from the document, drag, and then drop it on the field. See the [drag to capture](#) section for more details on how this works.

The fields will vary across different Workflows and document type defined in the Configuration Area. For Example - A date field value will have a date picker widget to enter the date value. It can be modified manually such as in cases where the OCR may not have captured the right date.

Similarly, based on the Workflow fields properties, some fields such as vendor, PO Number, etc can be looked up against the Dynamics 365 Finance's database using different properties. For amount related fields such as Invoice amount, you can optionally use the calculator widget to perform desired calculations and determine the amount. The value of this field is defaulted to the amount captured by OCR in case if the document went through OCR processing successfully.

You can default the view as Card style view or Grid style view in Table Type fields such as Line items, distribution, Purchase Receipt Line, etc. This preference can be defined in the settings panel.

**Note:** The fields in the Workflow item field panel may vary based on the user's access rights across different Workflows.

## Correcting fields using Drag to Capture tool

The Drag to Capture tool  allows you to hover over a word, grab onto it, and drag it over a field and let go to drop that word into the field. This option is available on the top-level toolbar of unsubmitted item viewer. You can capture (which draws a highlighted area around the selected text) multiple words, grab onto them, and drag them over a field to drop all those words into the field. This is a very useful tool to validate and correct values that were not captured correctly by OCR or to help make manual entry more efficient.

**Note:** This option is only applicable for documents or items that successfully went through the OCR process.

## Acquiring document for Integrated Application record

The Acquire Area allows you to add documents to the desired records of Integrated Application. The following [video](#) covers how to acquire a document related to Integrated Application record:

Follow the below steps to acquire document related to an integrated application record:

- 1) Select "**A document related to a specific application record**" from the type of document you are acquiring menu as shown in the below screen.
- 2) Click on "**Next**".

**What kind of document are you acquiring?**

Select from these areas:

- A workflow document
- A document related to a specific application record
- A document stored to a specific PaperSave document type

3) It will prompt to choose required details such as Integrated Application, Integrated Application Instance, Module, Record Type, Document Type. Enter the details and click on "**Next**" as shown in the below screen:

**Integrated Application Information**

Integrated Application\* :  
Blackbaud Enterprise CRM

Integrated Application Instance\* :  
QAUAT.BBInfinity

Module\* :  
Records

Record Type\* :  
Constituent

Document Type\* :  
Constituent Documentation

**Next** Back

4) You will be navigated to the integrated application records. Select the desired record for which you wish to acquire the document. Then, click on "**Add a New Document**" as shown below:

Blackbaud Enterprise CRM    QAUAT.BBInfinity    Records    Constituent    Constituent Documentation

Search Against: Lookup ID, Constituent Type, Constituent Name, Last, First +6 more..

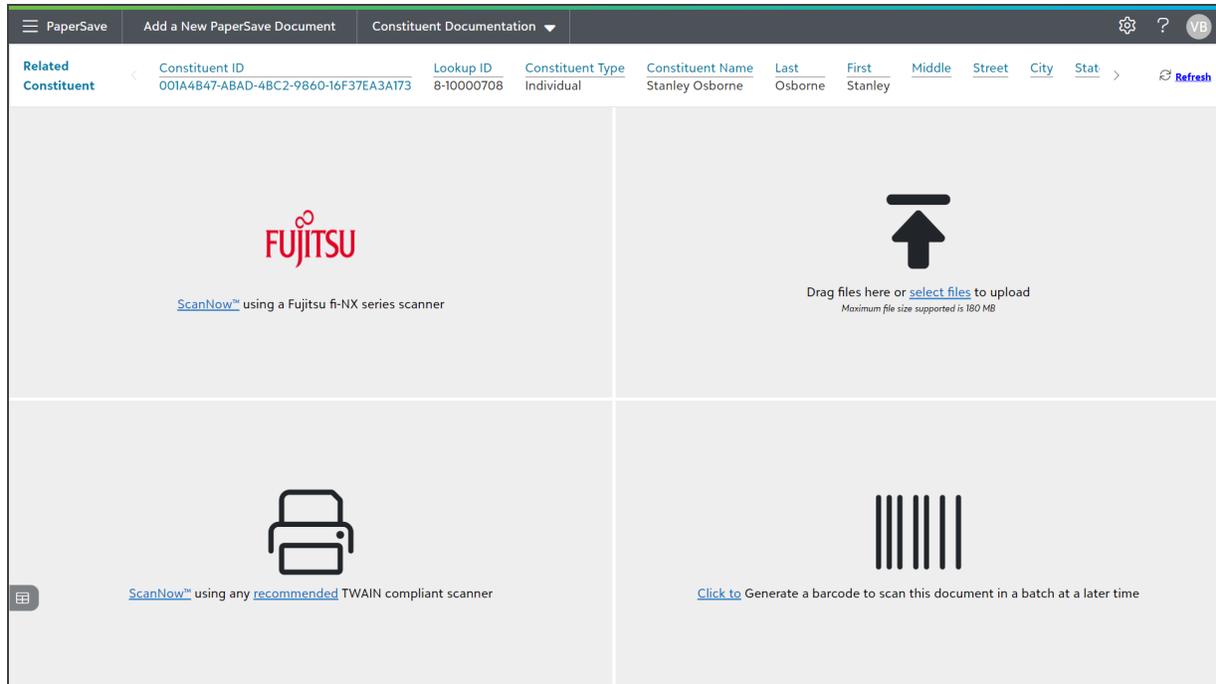
Lookup ID	Constituent Type	Constituent Name	Last	First	Middle	Street	City
<input checked="" type="checkbox"/> 8-10000708	Individual	Stanley Osborne	Osborne	Stanley			
<input type="checkbox"/> 8828	Individual	Marianne Lambert	Lambert	Marianne		P.O. Box 49	Mt. Pleasant
<input type="checkbox"/> 168	Organization	The Flower Patch				930 Hopewell Court	Maricopa
<input type="checkbox"/> 8-10000714	Individual	Greg Ellis	Ellis	Greg			
<input type="checkbox"/> 99	Organization	Bottling Unlimited				1524 Bottle Lane	Atlanta
<input type="checkbox"/> 8-10000662	Individual	Marianne Vincent	Vincent	Marianne			
<input type="checkbox"/> 13	Individual	Ryan K. Dorrior	Dorrior	Ryan	Kenneth	87 Smoky Court	Winston-Salem
<input type="checkbox"/> 8-10000456	Group-Household	Dorothea and Jason Campbell				911 Sycamore Drive	Athens
<input type="checkbox"/> 8-10000461	Group-Household	Derrick and Francis Baker				3207 Yucca Court	El Paso
<input type="checkbox"/> 8-10000215	Individual	Melissa Young	Young	Melissa		2662 Ashborough Court	Greensboro
<input type="checkbox"/> 8-10002009	Individual	BCRM OCR	OCR	BCRM			

100    1 of 10 pages (1000 items)

[+ ADD A NEW DOCUMENT](#)

5) Select any of the below acquisition methods from the PaperSave's File Capture options panel to add the document to the application record as shown in the below screen:

- ScanNow using TWAIN Scanner
- ScanNow using Fujitsu fi-NX series scanner
- Drag files or select files to upload
- Click to generate a barcode to scan a document in a batch at a later time



6) Submit the document to the integrated application upon validating the fields. Thus, you can successfully add documents to an integrated application record.

The following topics will help you explore the detailed features associated with each step of acquiring documents for Integrated Application record:

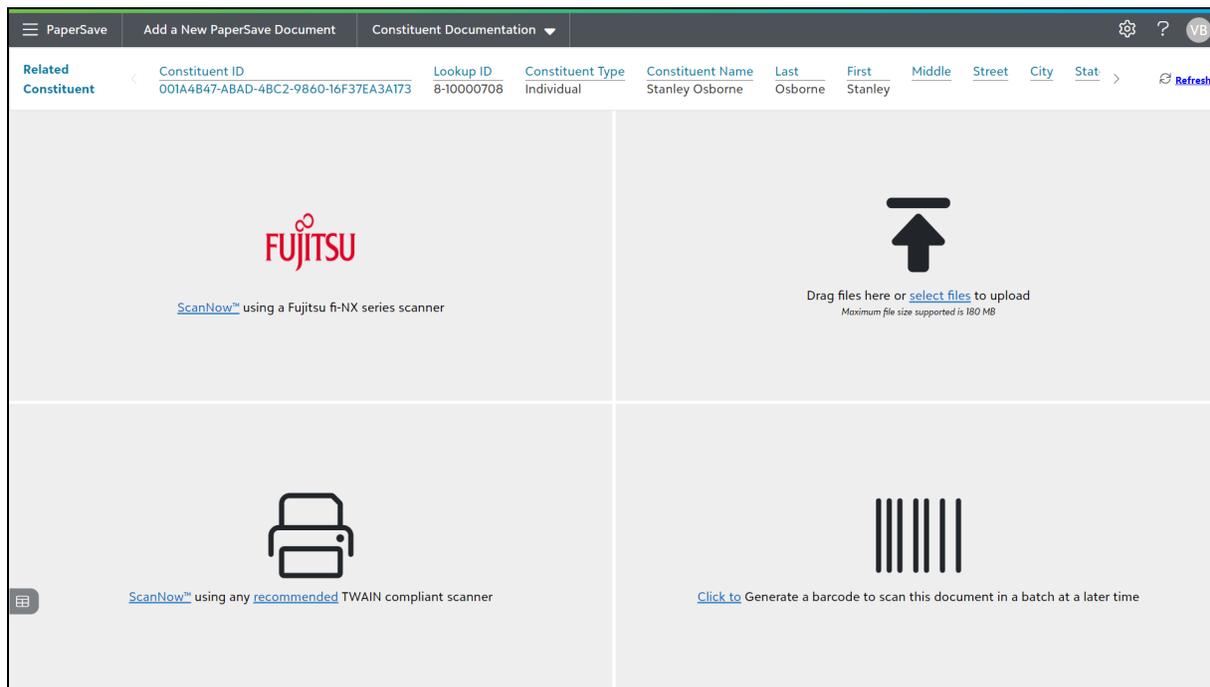
- [File capture option panel](#)
- [Validating and saving the document in item viewer](#)

## File capture option panel

You can select any of the file capture options as shown in the below screen to acquire the documents and add to the selected document type of the integrated app record.

- [ScanNow™ using TWAIN compliant scanner](#)
- [ScanNow™ using Fujitsu fi-NX series scanner](#)

- [Drag items or Select the files to upload](#)
- [Click to generate a barcode to scan the document in a batch at a later time](#)



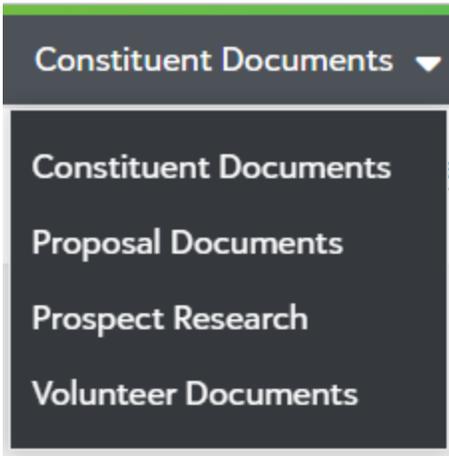
## Top level toolbar in file capture options panel

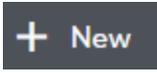
The file capture options panel has a top level toolbar in file capture options panel as shown below:



The following is the brief description of various options in the Top level toolbar in the file capture options:

- **Choose Document Type:** Select the desired document type from the available list to acquire a document for that particular document type as shown in following snap.



- **Previous** : Clicking on this option will navigate you to the previous document in the unsubmitted item list.
- **Next** : Clicking on this option will navigate you to the previous document in the unsubmitted item list.
- **NEW** : This option switches to the file capture options panel.
- **Print** : This option lets you print the selected document from the unsubmitted view.
- **Email** : This option lets you send the selected document via email.
- **Download** : This option lets you download a copy of the current document.

## Settings panel

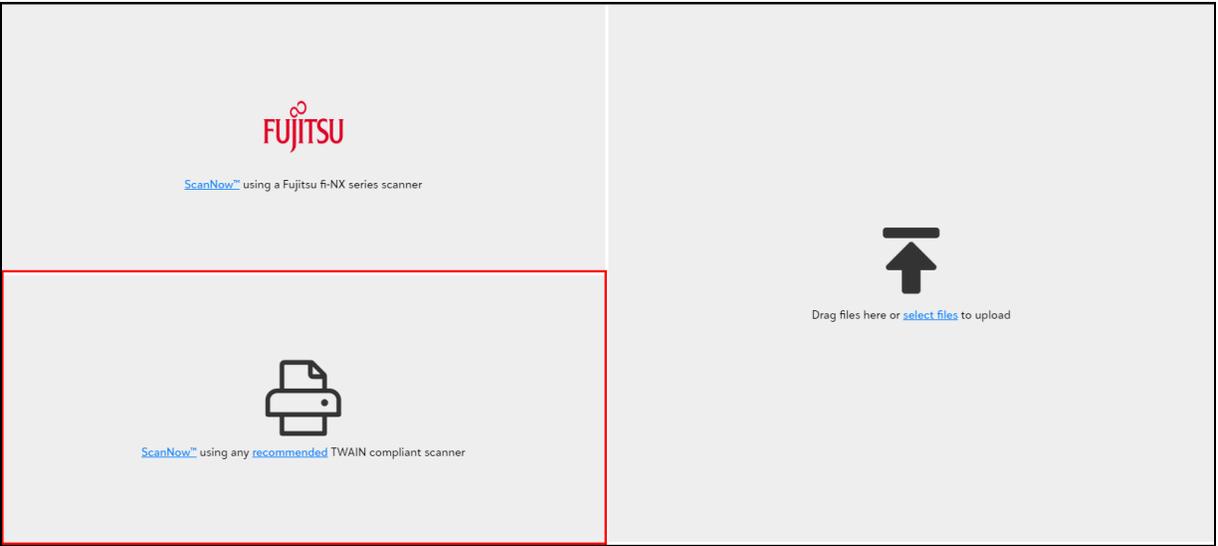
You can control the behavior of various app features from within the Settings panel as shown in the following figure. Click on  to open the settings panel to access various settings options available in the app's unsubmitted document view.

The following [video](#) explains different options in File Capture Settings panel in brief

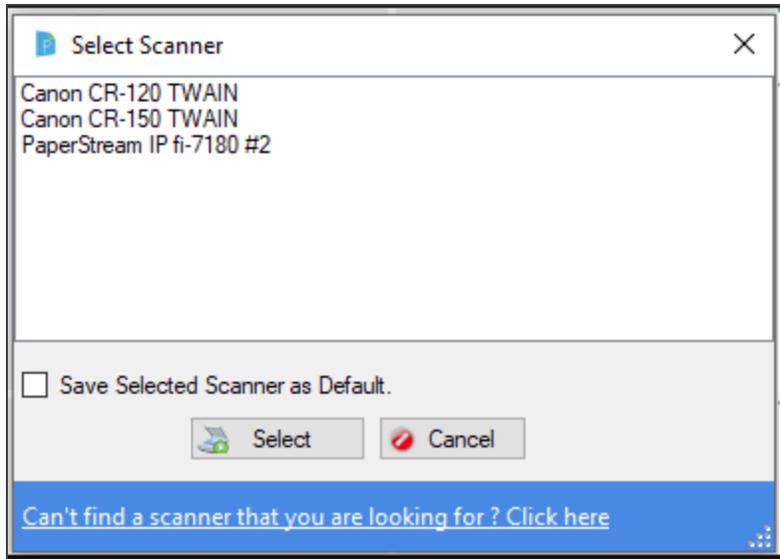
### **ScanNow using TWAIN scanner**

Watch the [video](#) to know how to add document for an Integrated app record using a TWAIN scanner.

Click on the "[ScanNow™](#) **using any TWAIN compliant scanner**" option in the file capture options panel to add a document from a TWAIN compliant scanner as shown below:



- You shall be prompted to pick a scanner from the available list of scanners upon clicking "**ScanNow™ using recommended TWAIN compliant scanner**".



- You can define your favorite scanner as default so that you do not have to choose it again next time.

**Note:** It may occur that you have installed drivers of a particular scanner but are not connected to the scanner. In such cases, the scanner might be displayed in the list as it detects the installed drivers and shows the same in the list.

**Tip:** you will be prompted to download and install the web scanning utility when scanning for the first time. You must download the utility as per the given instructions to scan documents using the TWAIN scanner.

**Note:** The scanning utility and thus TWAIN scanning only works on Windows operating system, whereas scanning on a Mac can only be accomplished with the Fujitsu fi-NX series scanner option.

The ideal configuration for PaperSave supported TWAIN Compliant Scanner is as shown below:

**For Output Type:** PDF

16 GB RAM			
Page Side	DPI	Scan Type	Total Pages
Single	200&300	Black & White/Color/Gray	Upto 600
Duplex	200&300	Black & White/Gray	Upto 600
	200	Color	Upto 200
	300	Color	Upto 40

8 GB RAM			
Page Side	DPI	Scan Type	Total Pages
Single	200&300	Black & White/Color/Gray	Upto 600

<b>Duplex</b>	200&300	Black & White	Upto 600
	200	Color	Upto 200
	300	Color	Upto 40
	200	Gray	Upto 400
	300	Gray	Upto 120

**For Output Type: TIFF**

<b>16 GB RAM</b>			
<b>Page Side</b>	<b>DPI</b>	<b>Scan Type</b>	<b>Total Pages</b>
<b>Single</b>	200&300	Black & White/Color/Gray	Upto 600
<b>Duplex</b>	200&300	Black & White/Color/Gray	Upto 600

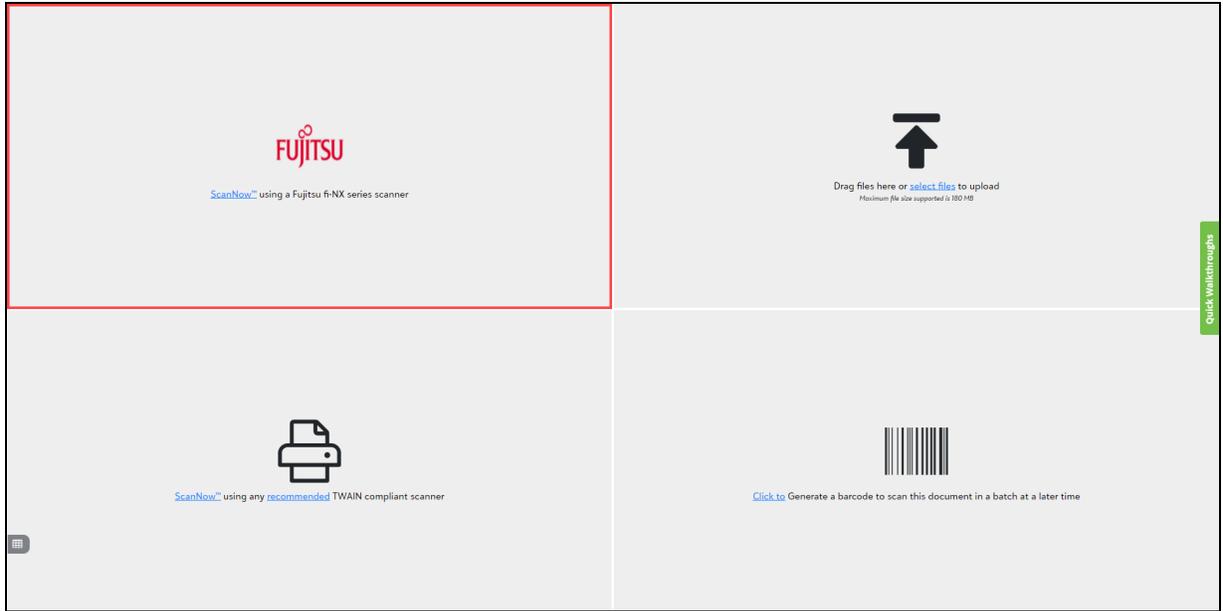
<b>8 GB RAM</b>			
<b>Page Side</b>	<b>DPI</b>	<b>Scan Type</b>	<b>Total Pages</b>
<b>Single</b>	200&300	Black & White/Color/Gray	Upto 600
<b>Duplex</b>	200&300	Black & White/Color/Gray	Upto 600

**Note:** Once you acquire the item, you can validate and save the document in the integrated app record. Click [here](#) to learn in detail about validating and saving the documents.

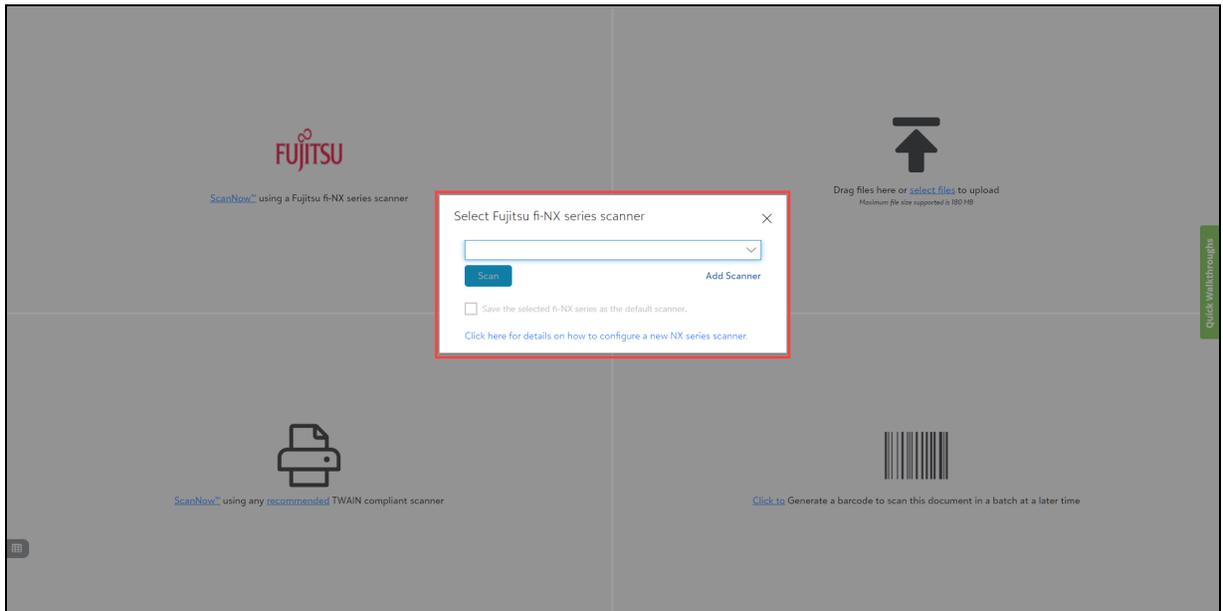
### Scan using Fujitsu fi-NX series scanner

Watch the [video](#) to know how to add document for an integrated app record using a Fujitsu fi-NX series scanner.

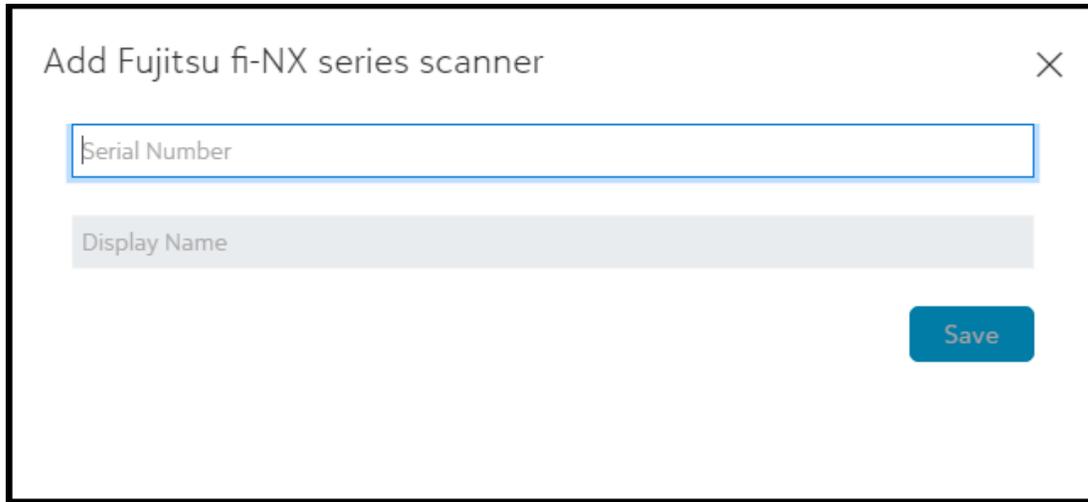
1) Click on the "**ScanNow™ using Fujitsu fi-NX series scanner**" in the file capture options panel to add a document from a Fujitsu fi-NX series scanner as shown below.



2) You will be prompted to pick a scanner from the available list of scanners upon clicking "**ScanNow™ using Fujitsu fi-NX scanner**". Select a scanner from the available list of scanners to proceed scanning the document as shown below:



3) Click on "**Add Scanner**" to add a new Fujitsu fi-NX series scanner to the scanner list by entering required details as shown below. Click on **Save** to add the scanner in the existing list.



The screenshot shows a dialog box titled "Add Fujitsu fi-NX series scanner" with a close button (X) in the top right corner. Below the title, there are two input fields: "Serial Number" (which is currently selected with a blue border) and "Display Name". At the bottom right of the dialog, there is a blue button labeled "Save".

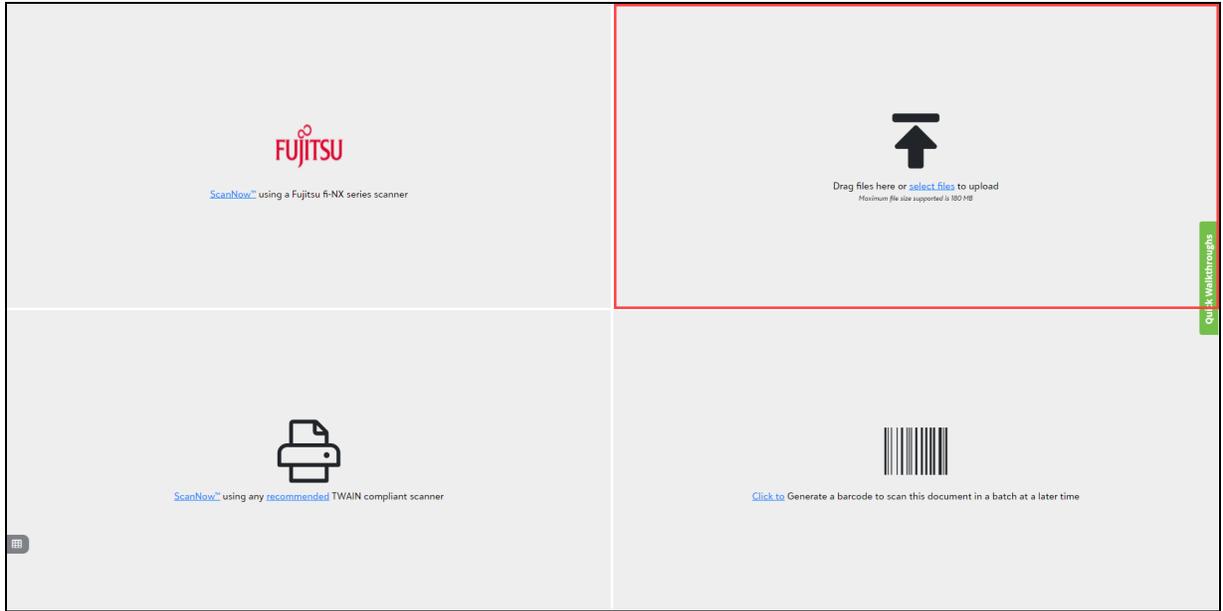
**Note:** Once you acquire the item, you can validate and save the document in the integrated app record. Click [here](#) to learn in detail about validating and saving the documents.

### Drag files or select files to upload

Watch the [video](#) to learn how to add document for an Integrated app record by dragging files or uploading from your file explorer.

PaperSave provides you two options to acquire by uploading electronic documentation:

- Drag one or more documents from your file browser to drag files tile in the file capture options panel.
- Click on "**select files**" (from within the Drag files tile) to select one or more documents through your file browser as shown below.



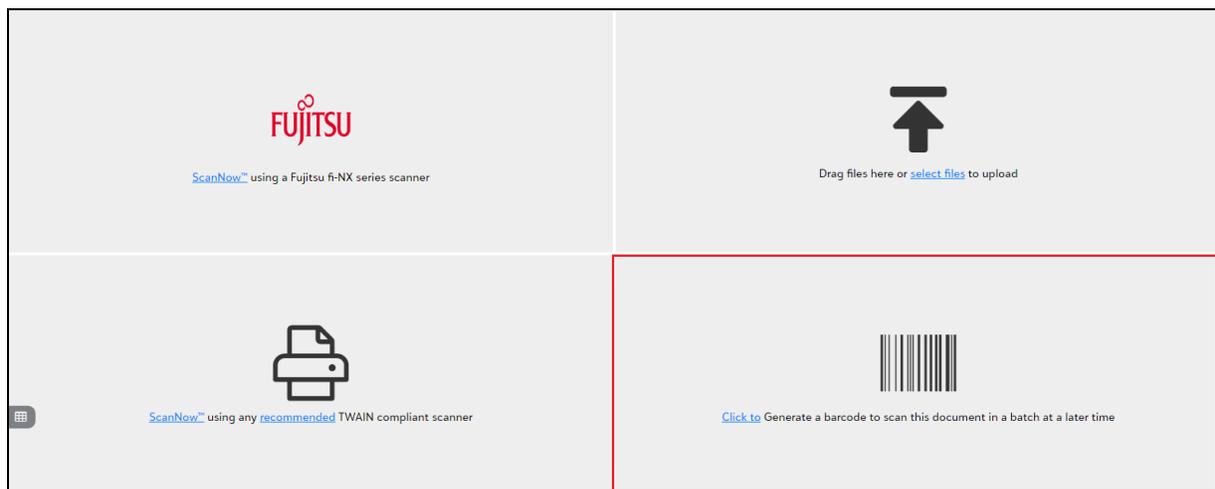
**Note:** Once you acquire the item, you can validate and save the document in the integrated app record. Click [here](#) to learn in detail about validating and saving the documents.

### Click to generate a barcode to scan later

In the file capture option panel, you get an option to generate a barcode using which you scan the documents in a batch at a later time.

Watch the [video](#) to know how to generate a barcode coversheet.

- Click on the option to generate a barcode as shown below:



The document created with a barcode will be available in the unsubmitted items. You can use the document with generated barcode as the separator to scan the documents in a batch at a later time.

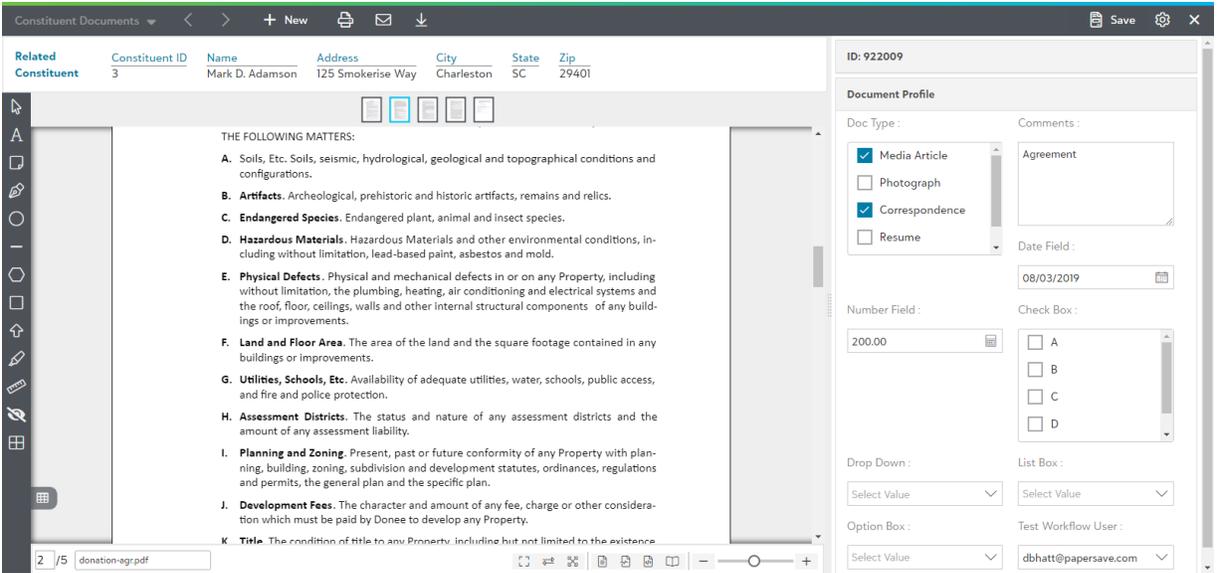
**Note:** Once you acquire the item, you can validate and save the document in the integrated app record. Click [here](#) to learn in detail about validating and saving the documents.

## Validating and saving the document in item viewer

Once the documents are successfully acquired, you are redirected to the item viewer to validate and save the documents under the selected document type of an integrated app record.

Watch the [video](#) to know how to validate profile fields in the item viewer.

Various operations can be performed on the documents while working with them in the document viewer such as editing fields, adding annotations, saving one or more documents.



You can explore various topics for validating and saving the documents, such as:

- **Top level toolbar options for unsubmitted items**

Watch the [video](#) to know about the various toolbar options for unsubmitted items.

- **Page manipulation view for unsubmitted items**

Watch the [video](#) to know more about page manipulation view.

- **Settings Panel in the item viewer**

The following [video](#) covers the Settings Panel for the item viewer(unsubmitted items) in the Browse Area:

- **Using Image page options for unsubmitted items**

The following [video](#) explains the how to use Image annotations for unsubmitted items in the Browse Area.

- **Save an acquired document from the item viewer**

## Unsubmitted Item list panel

Once you acquire the documents using any of the methods in File Capture options panel, the items can be accessed from unsubmitted items list before you submit the items. Unsubmitted item list comprises the list of Workflow items that are not yet submitted to the selected Workflow.

Watch the [video](#) to learn about the Unsubmitted Item list.

1) In the Item viewer, click on  icon to access the unsubmitted item list.

The screenshot displays a software interface for document processing. The main area shows a scanned check from Bank of America, dated 6-6-18, for \$1000.00, payable to Morrison Crown Anziz Fama. The check includes the sender's name (Francis A Deture, MD OR), address, and MICR line. The right sidebar contains a form for data entry with the following fields:

- ID: 1195841
- Batch: [edit icon]
- Field Actions: [Select Field Actions] [Go]
- Constituent \*: [Enter the value] [Search]
- Amount \*: [Enter Value] [Clear]
- Date: [Enter or select ...] [Calendar]
- Designation: [Enter the value] [Search]
- Name1 \*: [Enter the value] [Search]
- Check Number: [Enter Value]
- Company ID: [Add] [Delete]

At the bottom of the sidebar, there is a table with the following structure:

ID	Name
No records to display	

2) As you click on  icon in the item viewer, a slide out panel with the list of unsubmitted items will launch in the left corner of the screen. You can see the profile field details for all the unsubmitted items as shown below.

The screenshot displays a software interface with a top navigation bar containing 'PaperSave', 'Add a New PaperSave Document', and 'BBCRM Gift OCR Barcode Separator'. Below the navigation bar is a table with columns: ID, Created, Batch, Status, and BarcodeValue. The table contains five rows of data, with the last row (ID: 47533) selected. To the right of the table is a detailed view for the selected item, showing fields for ID (1195841), Batch, Field Actions, Constituent, Amount, Date, Designation, Name, Check Number, and Company ID. The Company ID section includes an 'Add' button and a table with columns 'ID' and 'Name', which currently shows 'No records to display'.

ID	Created	Batch	Status	BarcodeValue
<input type="checkbox"/>	47527 09/11/2023 03:39:35 AM	2309111309	OCR In Progress	
<input type="checkbox"/>	47528 09/11/2023 06:33:27 AM	2309111603	OCR In Progress	
<input type="checkbox"/>	47529 09/11/2023 10:05:04 AM	2309111934	OCR In Progress	
<input type="checkbox"/>	47532 09/12/2023 04:55:17 AM	2309121425	OCR In Progress	
<input checked="" type="checkbox"/>	47533 09/12/2023 07:30:30 AM		OCR In Progress	

Remove selected items

ID: 1195841  
Batch: [edit]

Field Actions:  
Select Field Actions [Go]

Constituent \*: [Enter the value] [Search]  
Amount \*: [Enter Value] [Calendar]

Date: [Enter or select ...] [Calendar]  
Designation: [Enter the value] [Search]

Name \*: [Enter the value] [Search]  
Check Number: [Enter Value]

Company ID: [edit] [^]

+ Add [Delete]

ID	Name
No records to display	

3) Double click on the desired unsubmitted item from the list to open it in the item viewer.

4) Select the items from the list that you want to discard and click on "Remove selected items" to remove them from the unsubmitted Item list.

The screenshot displays the PaperSave application interface. At the top, there are navigation options: 'PaperSave', 'Add a New PaperSave Document', and 'BBCRM Gift OCR Barcode Separator'. Below this is a table of items with the following columns: ID, Created, Batch, Status, and BarcodeValue. The table contains five rows, with the last row (ID: 47533) selected. The status for all items is 'OCR In Progress'. To the right of the table is a detailed view for the selected item (ID: 1195841). This view includes a 'Field Actions' section with a 'Go' button, and several input fields for 'Constituent \*', 'Amount \*', 'Date', 'Designation', 'Name1 \*', and 'Check Number'. Below these fields is a 'Company ID' section with '+ Add' and 'Delete' buttons, and a table with columns 'ID' and 'Name' that currently shows 'No records to display'.

ID	Created	Batch	Status	BarcodeValue
47527	09/11/2023 03:39:35 AM	2309111309	OCR In Progress	
47528	09/11/2023 06:33:27 AM	2309111603	OCR In Progress	
47529	09/11/2023 10:05:04 AM	2309111934	OCR In Progress	
47532	09/12/2023 04:55:17 AM	2309121425	OCR In Progress	
47533	09/12/2023 07:30:30 AM		OCR In Progress	

You can click on to perform Mass update field for all the unsubmitted items.

The unsubmitted item list displays the list of unsubmitted items. You will see the properties of each item in the grid including the item ID, Batch, Status, Actions, and other columns in each item row.

The following are statuses that may show for unsubmitted items in the list:

### 1) OCR in Progress

Workflow items acquired through the Workflow Area go through a process where Optical Character Recognition (OCR) is used to read and extract data off of the documents that are captured. The area will show a status of **“OCR in progress”** while this process is executing.

### 2) Script Execution

A status "**Script Execution**" displays for an item if an OnOCRDataRetrieved Event script is getting executed on the Workflow item.

### 3) OCR Error

The status of "**OCR Error**" displays red hyperlinked text on an item when an error is encountered while going through the OCR process. Clicking on the hyperlink reveals the details of the exact error encountered. When errors are encountered, you will have the opportunity to re-initiate the OCR process by clicking on the "**Retry**" hyperlinked text in the Action column.

**Note:**  Retry option gets displayed only when there is any item with **OCR Error** as status.

### 4) OCR Completed

A status of "**OCR completed**" displays for an item once it has gone through the OCR process successfully. You can expect to see data injected into fields captured by the OCR process with the confidence score of the capture once you see an item with this status.

### 5) Submission in Progress

A status of "**Submission in progress**" displays on an item when you submit an item. This status shows until the item is either submitted successfully or an error occurs.

### 6) Submission Error

The status of "**Submission Error**" appears on an item if an error is encountered during the process of submission. Clicking on the hyperlink will reveal the details of the exact error encountered. When errors are encountered, you will have the opportunity to re-initiate the submission process by clicking on the "**Retry**" hyperlinked text in the Action column.

## 7) Completed

A "**Completed**" status gets displayed briefly on an item when the submission completes successfully. A completed item disappears from the unsubmitted items list after displaying this status for a couple of seconds.

## Acquiring PaperSave documents

The Acquire Area allows you to add PaperSave documents. Follow the below steps to acquire document to an integrated application record:

- 1) Select "**A document stored to a specific PaperSave document type**" from the type of document you are acquiring menu as shown in the below screen.
- 2) Choose the document type from the list.
- 3) Click on "**Next**".

**What kind of document are you acquiring?**

Select from these areas:

- A workflow document
- A document related to a specific application record
- A document stored to a specific PaperSave document type

General Documentation

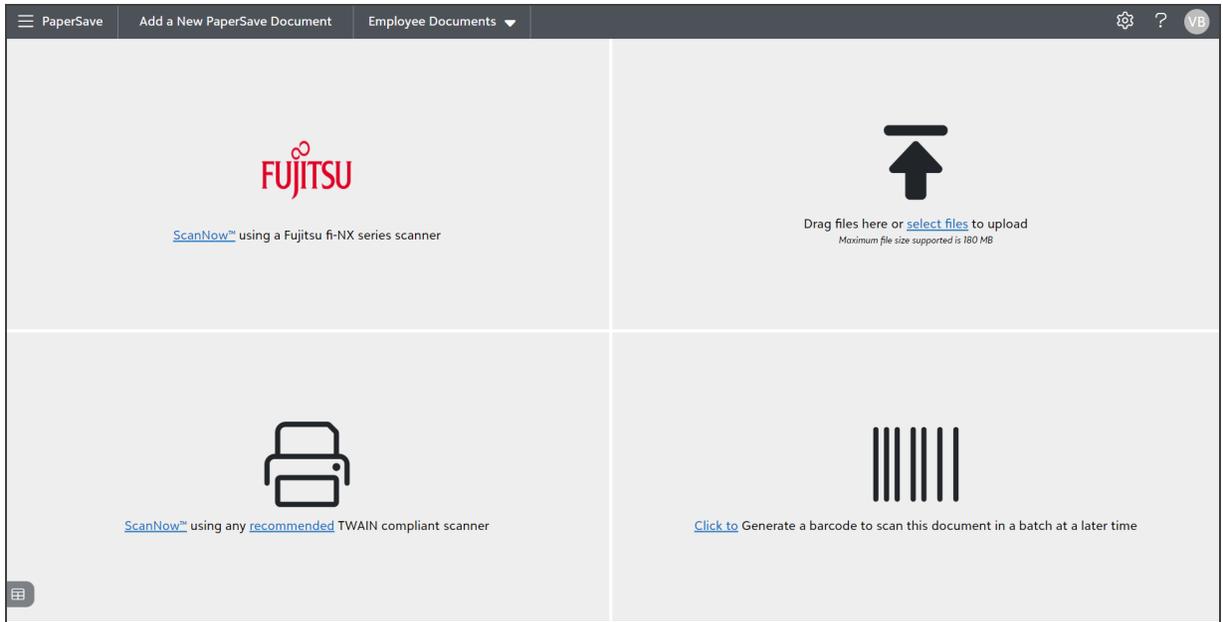
Select from one of these recently chosen items:

Records	Drop points	Record types
<input type="radio"/> Blackbaud Enterprise CRM - Records - Constituent - PSSTGCLOUDDB.BBInfinity	<input type="radio"/> Test Workflow Electronic Submission - Test Workflow	<input type="radio"/> Blackbaud Enterprise CRM - Records
<input type="radio"/> 85-Individual-Kelly A. Vaughn-	<input type="radio"/> VS_7260_WF Electronic Submission - VS_7260_WF	<input type="radio"/> Constituent
<input type="radio"/> Blackbaud Enterprise CRM - Transactions - Revenue - hvtest9\sql2014.BBInfinity	<input type="radio"/> Bill Automation Processing Electronic Submission - Bill Automation Processing	<input type="radio"/> Blackbaud Enterprise CRM - Transactions
<input type="radio"/> 18-Melissa C. Elzy-Payment-40.0000-Check-2007-03-30	<input type="radio"/> Automation Intacct Lookup Electronic Submission - Automation Intacct Lookup	<input type="radio"/> Revenue
<input type="radio"/> Blackbaud Enterprise CRM - Transactions - Revenue - PSSTGCLOUDDB.BBInfinity	<input type="radio"/> BRCRM Gift OCR With Check Process for Checks Only - BRCRM Gift OCR With Check Process	<input type="radio"/> Blackbaud's The Raiser's Edge - Records
<input type="radio"/> 3-Mark D. Adamson-Payment-100.00-Check-2006-01-15		<input type="radio"/> Constituent
<input type="radio"/> Blackbaud's The Raiser's Edge - Records - Constituent - Blackbaud Demo & HVTESTS1HA		<input type="radio"/> Dynamics 365 Business Central - Sales
<input type="radio"/> 1-Joseph P. Diresta-248 Twin Lane Building #3299-Birmingham-AL-35220		<input type="radio"/> Sales Invoice
<input type="radio"/> Dynamics 365 Business Central - Sales - Sales Invoice - CRONUS USA, Inc.		<input type="radio"/> Sales Order
<input type="radio"/> S-INVI02199		
<input type="checkbox"/> Set as Default		

Next

4) Select any of the below acquisition methods from the PaperSave's File Capture options panel to add the document to the desired PaperSave's document type as shown in the below screen:

- ScanNow using TWAIN Scanner
- ScanNow using Fujitsu fi-NX series scanner
- Drag files or select files to upload
- Click to generate a barcode to scan a document in a batch at a later time



5) Submit the document to the PaperSave upon validating the fields. Thus, you can successfully add documents stored to a specific PaperSave document type.

## A ScanLater/Recapture stack

PaperSave offers you the “**A ScanLater/Recapture stack**” option in the Acquire area to add a stack of documents to previously generated ScanLater coversheets. Follow the below steps to use this option:

1) Choose “**A ScanLater/Recapture stack**” in the Acquire area, then click on the “**Next**” button in the lower right corner.

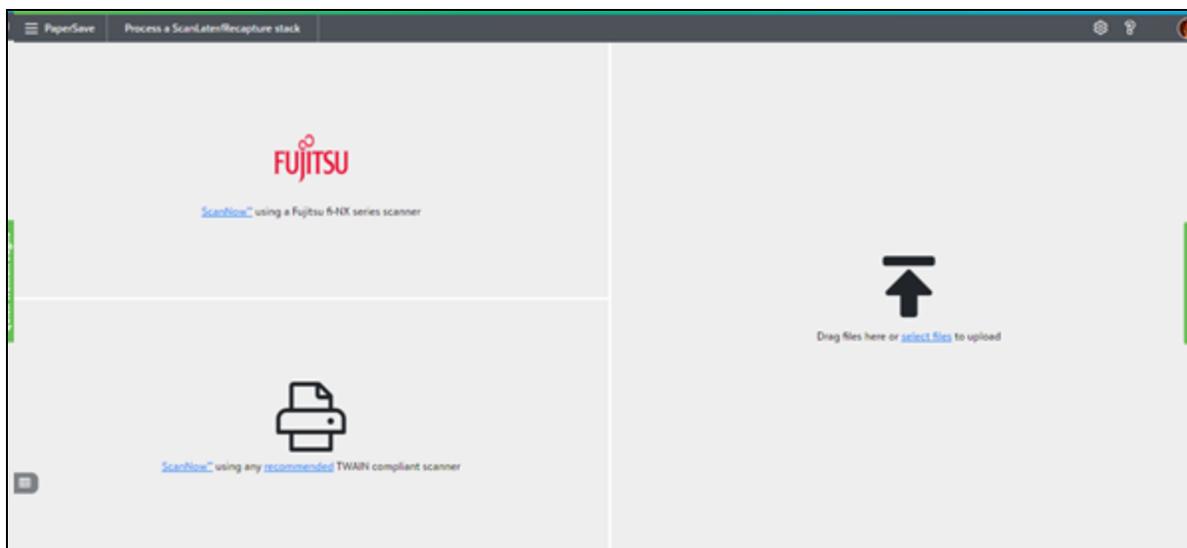
**Note:** There must be a barcode separator sheet at the beginning of the stack.

**What kind of document are you acquiring?**

Select from these areas:

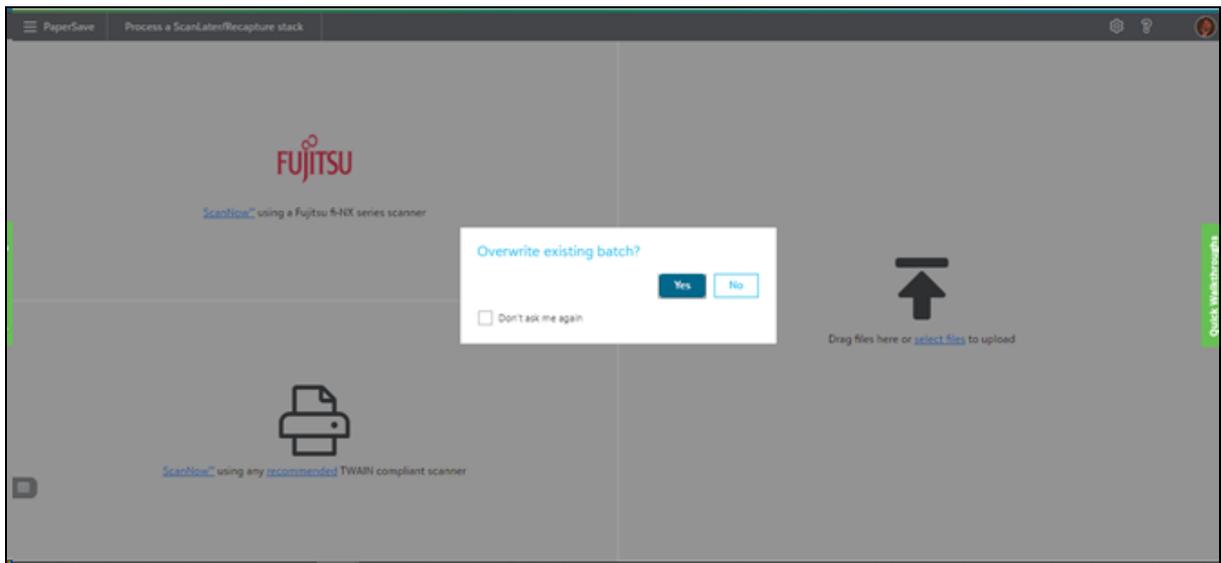
- A workflow document
- A document related to a specific application record
- A document stored to a specific PaperSave document type
- A ScanLater/Recapture stack

2) You will be directed to the “**Process a ScanLater/Recapture stack**” page to select your preferred acquisition method, as shown on the below screen.

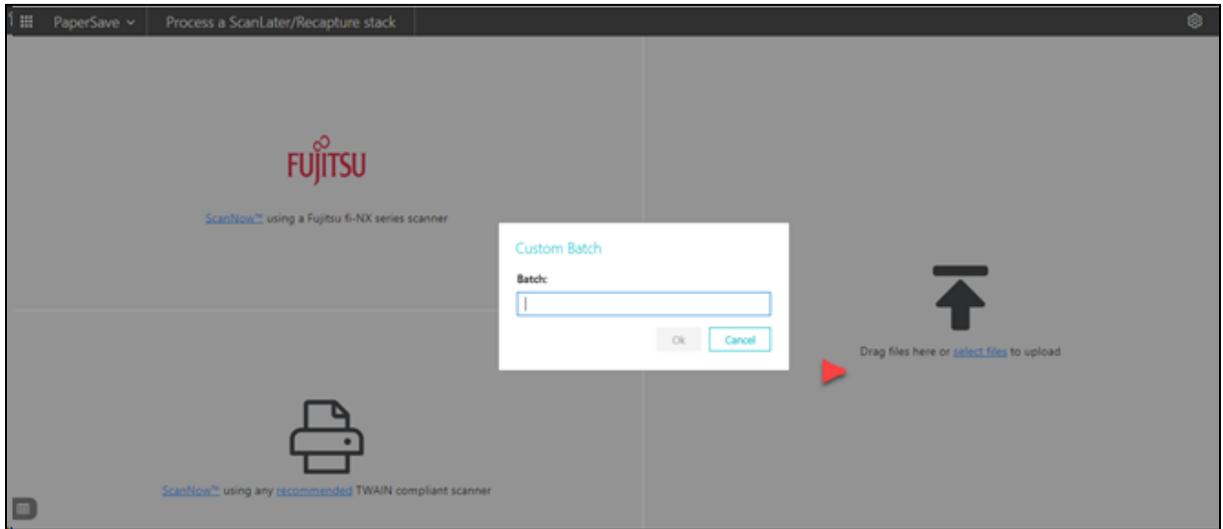


3) Once you add a stack of papers using your desired method, you may be prompted to overwrite the batch value set when the barcode coversheet was created, or create a new batch name, as shown in the below screen.

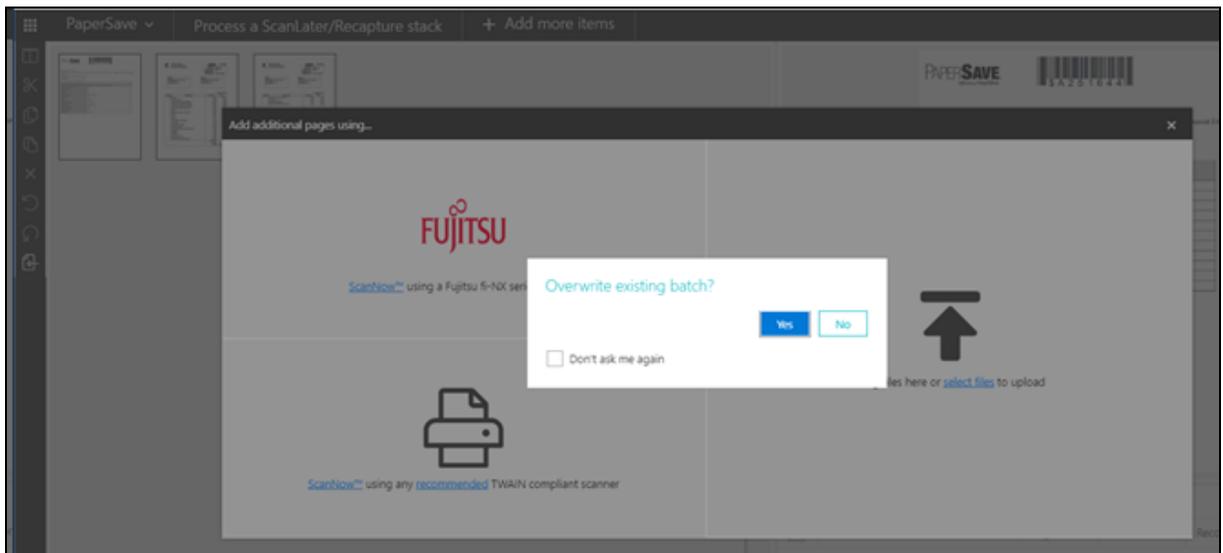
**Tip:** Click on **“Don’t Ask me again”** to disable the prompt. you can change your preference from the Settings panel using the **“Prompt to override the batch value during ScanLater acquisition”** option.



4) If you select **“Yes”** to overwrite the batch name, you will see a dialog window where you can enter the new batch name, as shown in the below screen. If you select **“No”**, the items will open in the **“Page Manipulation View”**.

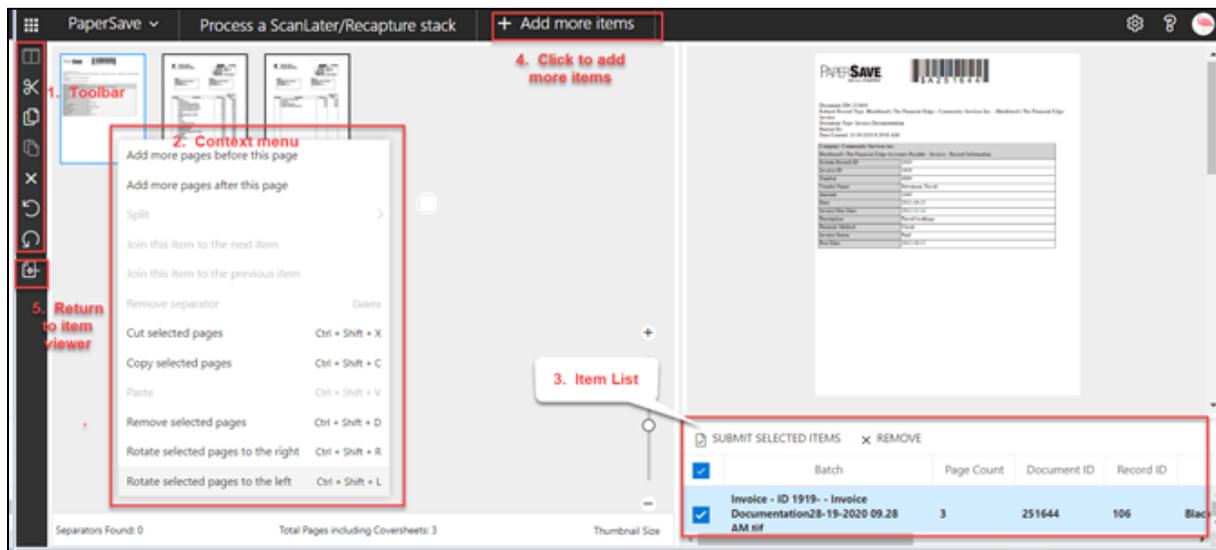


5) If there are one or more unsubmitted item(s) for ScanLater/Recapture, then you will be directed to the "Page Manipulation View", showing the unsubmitted items with the option to "Add more items". When you click on "Add more items", a popup window will appear for you to select your preferred acquisition method, as shown in the below screen. You may be prompted to overwrite the existing batch name.



6) Once the items are processed, they will open in "Page Manipulation View", where you can perform various operations before submitting them, such as:

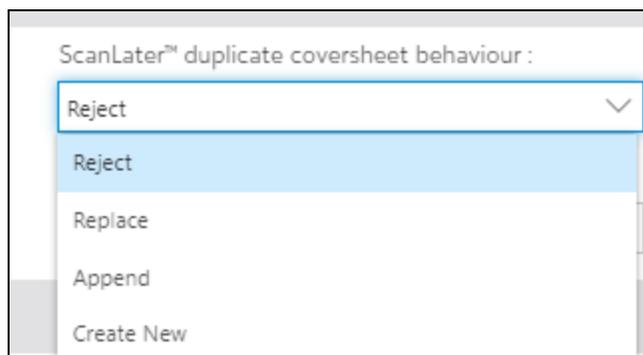
- Add, copy, remove, rotate pages, etc., using the options available in the **Toolbar** on the right.
- Manipulate the pages (thumbnails) using the **Context menu**, which can be accessed by right-clicking on a thumbnail.
- Submit or remove items using the '**Item List**' toolbar in the lower right-hand corner. You can also submit items from the 'Item manipulation view' page.
- **Add more items** to the stack.
- Click on the '**Return to Item manipulation view**' option to open documents in the content viewer to validate data, submit item(s), etc.



7) Once the document(s) have been submitted successfully, they can be accessed from the respective Integrated App Record or Workflow.

**Note:** If a coversheet has already been submitted, you will receive a notification in the upper right-hand corner of the page. The duplicate coversheets' behavior depends on the value of the “**ScanLater Duplicate CoverSheet behaviour**” setting, which is defined for each document type in the Configuration area. The options are shown and explained below:

- **Reject:** It will not append the document to the existing coversheet.
- **Replace:** It will replace the existing coversheet with the newly added stack of papers.
- **Append:** It will merge the existing coversheet with the newly added stack of papers.
- **Create New :** It will create a new item for the newly added stack of papers without inheriting any details from the coversheet.



## Acquiring recently added documents

The Acquire Area allows you to add documents to the recently acquired documents to the Records, Drop points or Record types. You can select any of the recently added documents as shown in the below screen:

What kind of document are you acquiring?

Select from these areas:

A workflow document

A document related to a specific application record

A document stored to a specific PaperSave document type

Select from one of these recently chosen items:

<p><b>Records</b></p> <p><b>Blackbaud Enterprise CRM - Records - Constituent - PSSTGCLOUDDB.BBInfinity</b></p> <p><input type="radio"/> 85-Individual-Kelly A. Vaughn-</p> <p><b>Blackbaud Enterprise CRM - Transactions - Revenue - hvtest9\lcal2014.BBInfinity</b></p> <p><input type="radio"/> 18-Melissa C. Elzy-Payment-40.0000-Check-2007-03-30</p> <p><b>Blackbaud Enterprise CRM - Transactions - Revenue - PSSTGCLOUDDB.BBInfinity</b></p> <p><input type="radio"/> 3-Mark D. Adamson-Payment-100.00-Check-2006-01-15</p> <p><b>Blackbaud's The Raiser's Edge - Records - Constituent - Blackbaud Demo &amp; HVTTESTSIHA</b></p> <p><input type="radio"/> 1-Joseph P. Diresta-248 Twin Lane Building #3299-Birmingham-AL-35220</p> <p><b>Dynamics 365 Business Central - Sales - Sales Invoice - CRONUS USA, Inc.</b></p> <p><input type="radio"/> S-IN\102199</p> <p><input type="checkbox"/> Set as Default</p>	<p><b>Drop points</b></p> <p><input type="radio"/> Mime Types Electronic Submission - Mime Types</p> <p><input type="radio"/> Test Workflow Electronic Submission - Test Workflow</p> <p><input type="radio"/> VS_7260_WF Electronic Submission - VS_7260_WF</p> <p><input type="radio"/> Bill Automation Processing Electronic Submission - Bill Automation Processing</p> <p><input type="radio"/> Automation Intacct Lookup Electronic Submission - Automation Intacct Lookup</p>	<p><b>Record types</b></p> <p><b>Blackbaud Enterprise CRM - Records</b></p> <p><input checked="" type="radio"/> Constituent</p> <p><b>Blackbaud Enterprise CRM - Transactions</b></p> <p><input type="radio"/> Revenue</p> <p><b>Blackbaud's The Raiser's Edge - Records</b></p> <p><input type="radio"/> Constituent</p> <p><b>Dynamics 365 Business Central - Sales</b></p> <p><input type="radio"/> Sales Invoice</p> <p><input type="radio"/> Sales Order</p>
--	--	---

**Next**

Follow the below steps to acquire recently added documents:

- 1) Select from the available record types, drop points, or records in the "**Select from the one of the recently chosen items**" section of the dialog box.
- 2) Click on "**Next**" option available at the bottom-right corner in the dialog box.
- 3) Add the document using the available file capture methods.
- 4) Submit the document to Workflow or integrated app record based on the type of method to selected to acquire the document.

# Browse Area

This section is designed to get the audience up and running with PaperSave Browse Area. You can learn about the key features and functionalities of our all new PaperSave Browse Area, a robust and lightweight approach to browse the documents.

## Introduction to Browse Area

The Browse Area facilitates you to find PaperSave documents based on record information of an integrated application. It provides you with the flexibility to drill down to the integrated application record type and different integrated application instances. You can browse the list of integrated app records for which PaperSave documents are associated by choosing the context from the area's tree view. You can also browse PaperSave documents that are not associated with integrated application based on the document type in PaperSave.

The Browse Area enables you to add the documents to an existing record in the integrated application. It offers various file capture options such as Scan using TWAIN scanner or Fujitsu fi-NX series scanner, upload files from your file explorer, and generate barcode to scan the document at a later time. You are offered to batch these documents within the app or bring them into the app without assigning them to a batch. You can also annotate these documents to highlight important information, redact sensitive data, write comments directly on document pages, and more. You can validate the document fields and submit the document to the integrated application record.

You can go on to view the related and interrelated documents for the integrated app records, where the Browse Area provides a feature to view the latest field information for the integrated app records. You can click on a document in the list to open it in a document viewer. You can again edit the Document fields, print, download a copy, and share a copy via email.

The following topics will help you explore the detailed features associated with each step in the Browse Area:

- [Getting started with Browse Area](#)
- [Choose Context to browse PaperSave documents](#)
- [Browsing documents within Integrated App records](#)
- [Browsing PaperSave \(standalone\) documents](#)

## Getting started with Browse Area

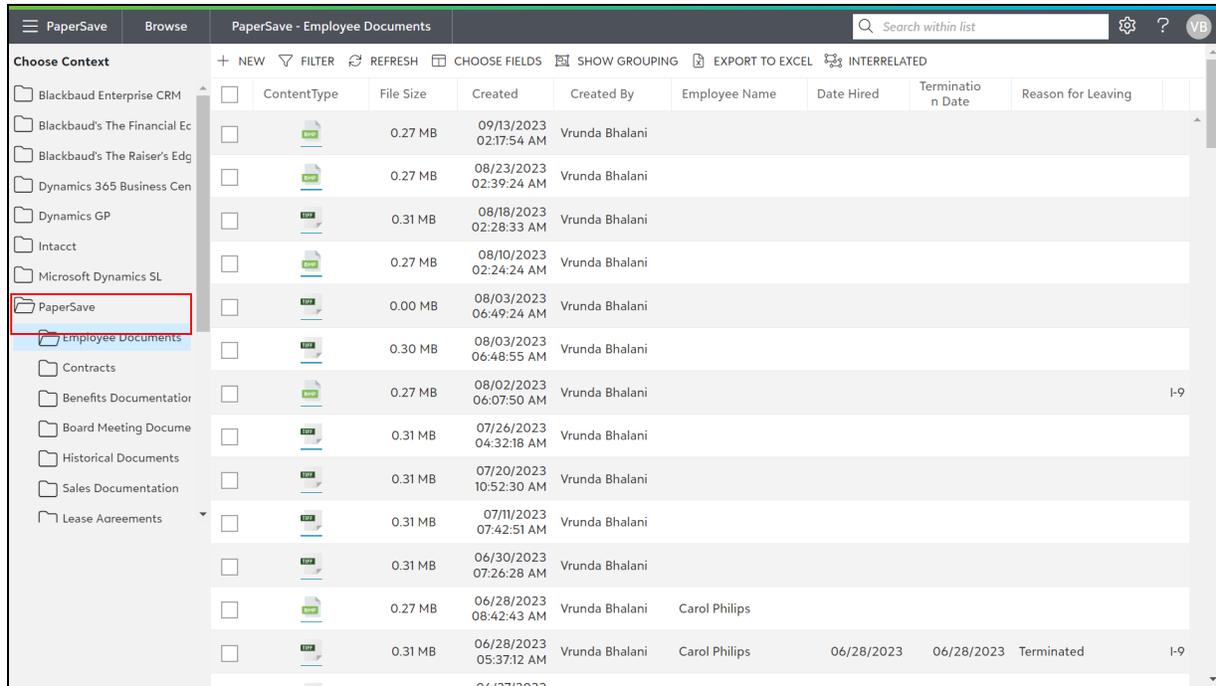
This guide contains details on all the functions and uses of the Browse Area. It is organized into sections that deeply describe options available around each major function in the Browse Area. The best place to start learning is by going through the Quick Walkthrough of the Browse Area and watching all of the “how-to” video tutorials presented for each step in the Browse Area. This will give you a good overview of the Browse Area's typical flow.

Before you start using Browse Area, you need to know the integrated application context for which you wish to browse the PaperSave documents.

Watch the [video](#) covers how to get started with the Browse Area.

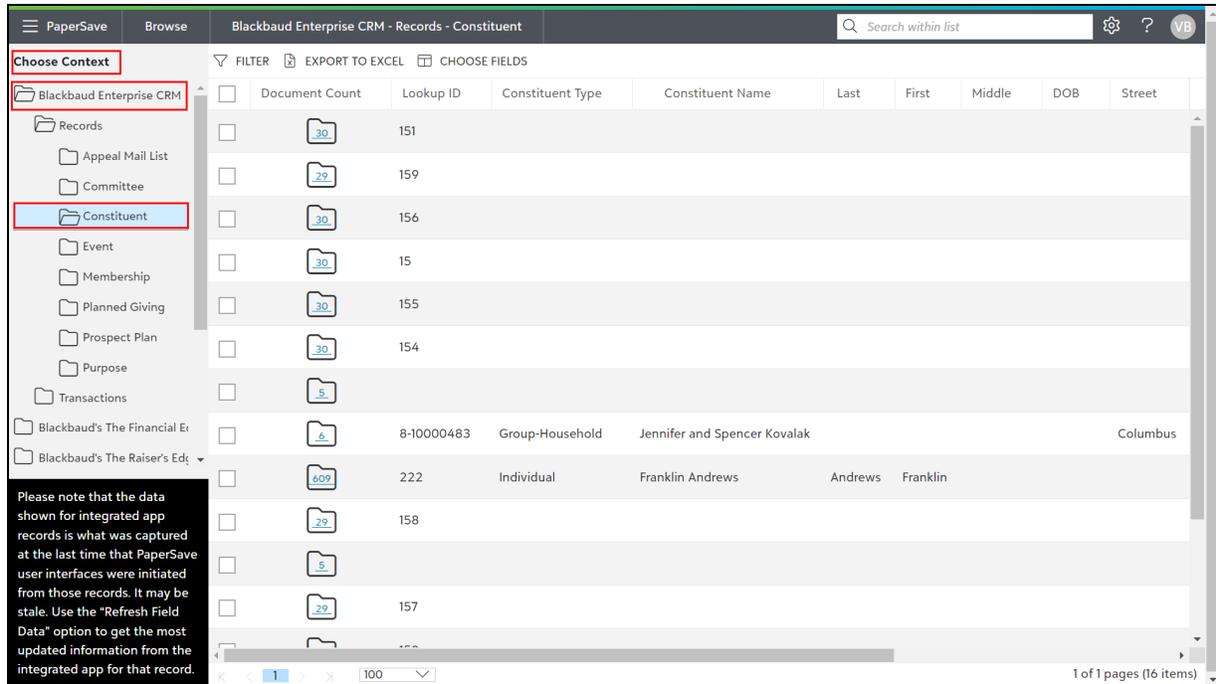
## Choose Context to browse PaperSave documents

You can access the PaperSave documents associated with an integrated application record as well as the PaperSave documents for different document types (non integrated application). You need to choose a context from the tree view (in the left corner) to start browsing the desired documents or records as shown in the below screen:



## Choose Context for an Integrated Application

- Choose the context to browse the documents for the desired record type of an integrated application. The currently selected context is displayed in the Application bar in the format of "**Integrated App - Module - Record type**". For example - Dynamics GP - Purchasing - Purchase Order as shown below.



- If the Integrated application does not contain any module, then Browse Area displays the context in the format of "**Integrated App - Record Type**". For Example - Blackbaud's The Raiser's Edge - Constituent.

## Choose Context for PaperSave (Non-Integrated application)

- Choose the context to browse PaperSave documents for desired document type as shown below:

Content Type	File Size	Created	Created By	Employee Name	Date Hired	Termination Date	Reason for Leaving
	0.27 MB	09/13/2023 02:17:54 AM	Vrunda Bhalani				
	0.27 MB	08/23/2023 02:39:24 AM	Vrunda Bhalani				
	0.31 MB	08/18/2023 02:28:33 AM	Vrunda Bhalani				
	0.27 MB	08/10/2023 02:24:24 AM	Vrunda Bhalani				
	0.00 MB	08/03/2023 06:49:24 AM	Vrunda Bhalani				
	0.30 MB	08/03/2023 06:48:55 AM	Vrunda Bhalani				
	0.27 MB	08/02/2023 06:07:50 AM	Vrunda Bhalani				I-9
	0.31 MB	07/26/2023 04:32:18 AM	Vrunda Bhalani				
	0.31 MB	07/20/2023 10:52:30 AM	Vrunda Bhalani				
	0.31 MB	07/11/2023 07:42:51 AM	Vrunda Bhalani				
	0.31 MB	06/30/2023 07:26:28 AM	Vrunda Bhalani				
	0.27 MB	06/28/2023 08:42:43 AM	Vrunda Bhalani	Carol Philips			
	0.31 MB	06/28/2023 05:37:12 AM	Vrunda Bhalani	Carol Philips	06/28/2023	06/28/2023	Terminated I-9

For PaperSave documents, it displays the context as "**PaperSave - Document type**" in the application bar.

**Note:** The Browse Area remembers and loads the previously accessed context the next time you log in to the Browse Area.

## Browsing documents within Integrated App records

The Browse Area facilitates you to browse the instances of the type of records in an integrated application that PaperSave is integrated into.

Watch the [video](#) covers how to browse Integrated app records.

You can choose the context for an Integrated application from the tree view on the left corner of the screen as shown below:

The screenshot displays the Blackbaud Enterprise CRM interface. On the left, a 'Choose Context' sidebar is visible, with 'Constituent' selected. The main area shows a table of records. The table has columns for Document Count, Lookup ID, Constituent Type, and Constituent Name. The following table represents the data shown in the screenshot:

Document Count	Lookup ID	Constituent Type	Constituent Name
30	151		
29	159		
30	156		
30	15		
30	155		
30	154		
5			
6	8-10000483	Group-Household	Jennifer and Spencer Kovalak
609	222	Individual	Franklin Andrews
29	158		
5			
29	157		

A note at the bottom left of the screenshot states: "Please note that the data shown for integrated app records is what was captured at the last time that PaperSave user interfaces were initiated from those records. It may be stale. Use the 'Refresh Field Data' option to get the most updated information from the integrated app for that record."

The above screen shows the list of records for the record type "Constituent" in Blackbaud's CRM. The header columns in the list will vary based on the selected record type.

**Tip:** Document Count column displays the total number of documents attached to that particular record for any chosen context.

**Note:** The Browse Area shall display only those record type for which the current user has the rights to view documents for.

The following are the topics covered in Browse Integrated app records section:

- [Adding a new document to an Integrated App record](#)
- [Viewing Related documents for an Integrated App record](#)

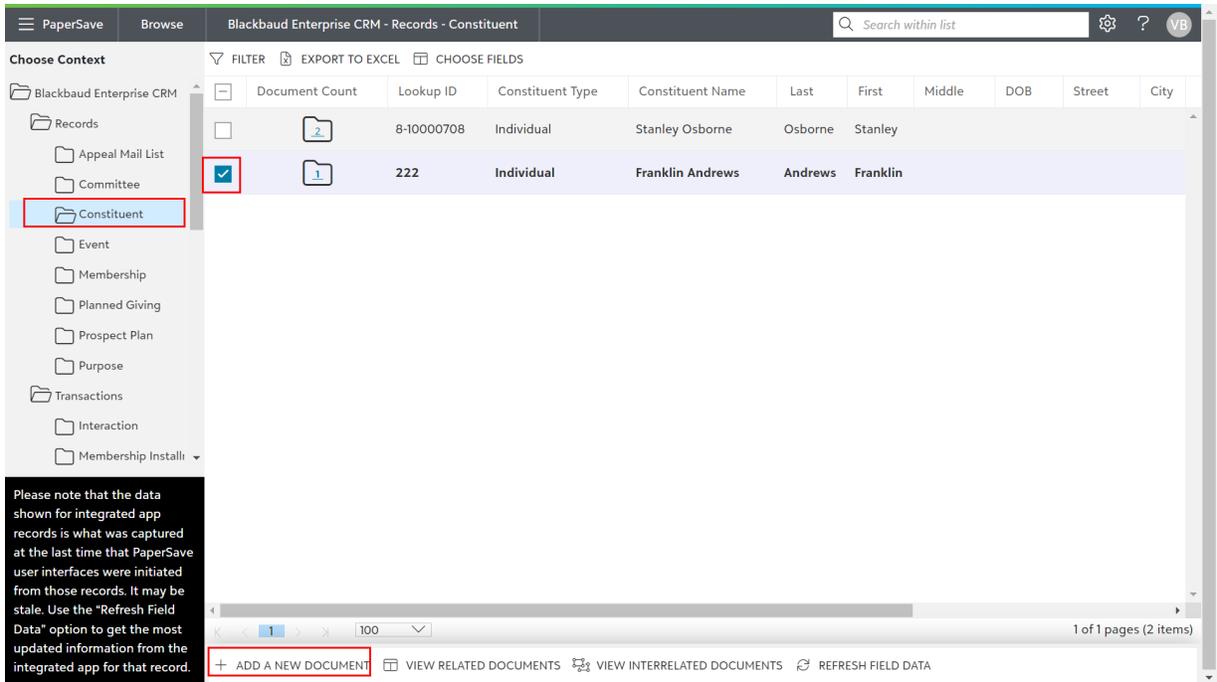
- [Viewing Interrelated documents for an Integrated App record](#)
- [Refresh Field Data](#)
- [List toolbar options in Browse Area](#)
- [Application bar in Browse Area](#)

## Adding a new document to an Integrated App record

You can add new documents to an integrated app record using various file capture options such as scan documents using TWAIN compliant scanner or Fujitsu fi-NX series scanner, uploading files from your file explorer, and generate a barcode to scan the documents in a batch at a later time.

Follow the below steps to add a new document to an integrated app record:

- 1) Choose the desired context in the left tree view. you will see list of records for the selected integrated application context.
- 2) Select the desired record for which you wish to add a new document.
- 3) Click on the option titled "**ADD A NEW DOCUMENT**" from the slide up panel that pops up from the bottom of the screen as shown in the below screen.



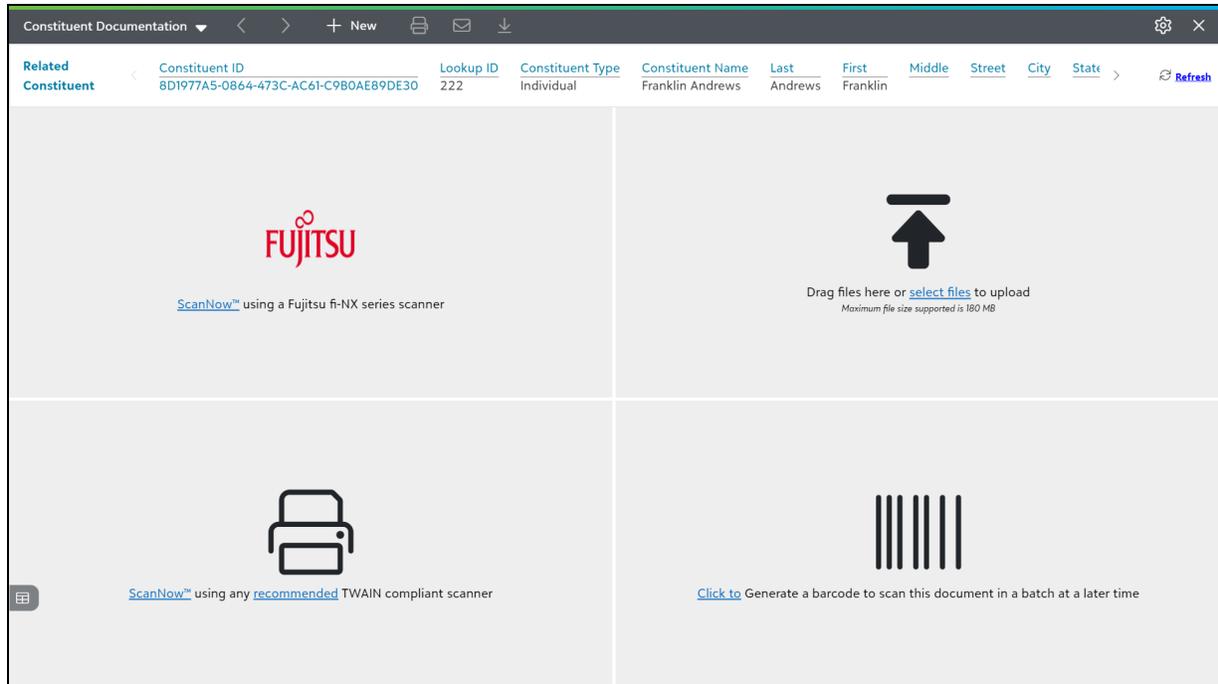
Please note that the data shown for integrated app records is what was captured at the last time that PaperSave user interfaces were initiated from those records. It may be stale. Use the "Refresh Field Data" option to get the most updated information from the integrated app for that record.

The following are the topics related to adding a new document to an integrated application record:

- [File Capture options panel to add new document to integrated app](#)
- [Setting a Batch and default field values](#) for the documents as they are scanned/uploaded through the app.
- [Validating the documents](#) in item viewer.
- [Saving the documents](#) to an integrated app record.

## File capture options panel in Browse Area

The Browse Area presents the various file capture options as shown below:



You can select any of the following file capture options to acquire the documents in PaperSave Browse Area:

- [ScanNow using TWAIN compliant scanner](#)
- [ScanNow using Fujitsu fi-NX series scanner](#)
- [Drag items or select the files to upload](#)
- [ScanNow using Check scanner](#)

## Top level toolbar in file capture options panel

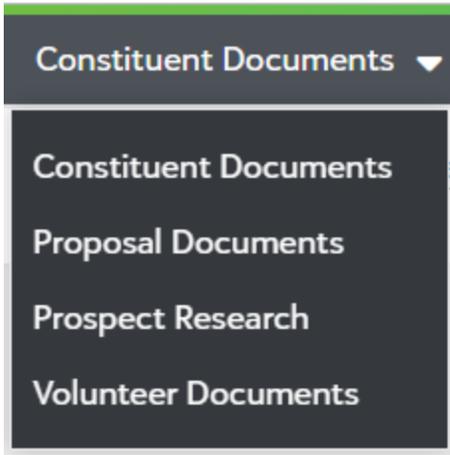
The file capture options panel has a top level toolbar in file capture options panel as shown below:



The following is the brief description of various options in the Top level toolbar in the file capture options:

- **Choose Document Type**

Select the desired document type from the available list to acquire a document for that particular document type as shown in following snap:

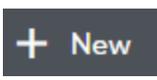


- **Previous** 

Clicking on this option will navigate you to the previous document in the unsubmitted item list.

- **Next** 

Clicking on this option will navigate you to the previous document in the unsubmitted item list.

- **NEW** 

This option switches to the file capture options panel.

- **Print** 

This option lets you print the selected document from the unsubmitted view.

- **Email** 

This option lets you send the selected document via email.

- **Download** 

This option lets you download a copy of the current document.

## Settings panel

You can control the behavior of various app features from within the Settings panel as shown in the following figure. Click on  to open the settings panel to access various settings options available in the app's unsubmitted document view.

The following [video](#) explains different options in File Capture Settings panel in the Browse Area:

## Setting Batch and Field Defaults

Through the process of adding items using either a scanner or uploading them from your file explorer, the area will prompt you with a dialog titled: '**Set Batch & Field Defaults**'. This dialog lets you add the items you are acquiring to a new or existing batch as well as set default values for profile fields as shown below.

## Batch

This allows you to add the documents being acquired to a specific batch (group).

- You can enter that batch in **manually** or you can select it from the drop-down list to add the items to an **existing batch**. This list shows all the batches that currently have unsubmitted items.

- You can enter that batch value manually to add the document to a **new batch**.
- Click on '**Auto generate**' link to assign an auto-generated number to the Batch.

**Note:** If you keep the batch field empty, then your items will be added without a batch. The details of the batch for each item will be displayed in the batch column in the slide out panel.

**Note:** The maximum character limit for manually entering the Batch details is 30.

The special characters can be included in the batch name:

Special characters to be considered:

- ~ ` ! @ # \$ % ^ & \* ( ) \_ - + = { } | [ ] \ ; : " ' < > ? , . /

Spanish characters to be considered:

- á, é, í, ó, ú, ñ, ü, ç, j

French characters to be considered:

- ë, ï, ü, à, è, ù, â, ê, î, ô, û, é, Ç

## Setting defaults for this Acquisition

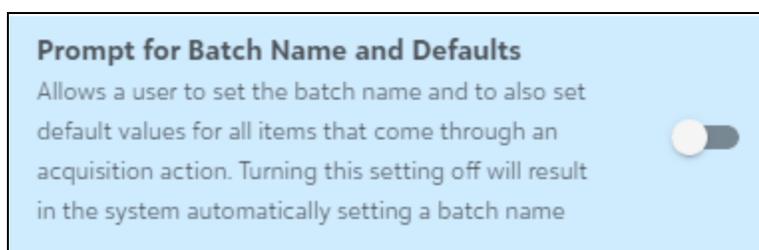
You can set default values for Profile fields on single or group of items that you acquire.

**Note:** The default values loaded in the profile fields will be driven by **Drop points defaults first**. If the drop point defaults are not set, then it will consider **Document type defaults** or **Workflow field defaults**. Otherwise, the profile fields will be empty and user can manually set the individual values.

## Don't Ask me again

You can turn off the batch prompt by checking off "**Don't ask me again**" and clicking on "**OK**". your preference will be saved for subsequent acquisitions and you will no longer be prompted to add a batch or for the opportunity to set default values for fields being acquired.

**Tip:** If you need to change the preference and turn the prompt back on, then you can do so from the settings panel by turning the toggle switch labeled: "Batch and Defaults" to "**ON**" as shown in the below screen.



## Validating the document in item viewer

When you acquire documents from the file capture options panel using any acquisition methods, the acquired documents will be listed in the unsubmitted item list until you are ready to validate and save or submit them. Unsubmitted documents can be selected from the item list and opened in the Item viewer in the Browse Area once they are acquired successfully.

Watch the [video](#) to learn about validating Profile fields in the Browse Area.

Various operations can be performed on the documents while working with them in the document viewer such as editing fields, adding annotations, saving one or more documents.

The screenshot displays a web application interface for document management. The main area shows a scanned document, which is a check from Pamela L. Saulsby to Morrison Brown, Argiz Farm, for \$150.00. The check is dated 9 SEPT 2018 and has a 'VOID' stamp. The document is displayed in a viewer with a toolbar at the bottom.

The sidebar on the right contains the following information and controls:

- ID:** 1197601
- Batch:** 132507728769009644 Document.pdf
- Field Actions:** Select Field Actions (dropdown) and Go (button)
- Table field BCRM:**
  - + Add (button)
  - Delete (button)
  - Table with columns: Date, Number, Drop DOWN, Text Box, |
  - No records to display
  - 0 of 0 pages (0 item)
- Date field:** 07/10/2020 (with calendar icon)
- Media Publication:** Enter Value (text input)
- Constituent Document Comments:** Enter Value (text input)

You can explore various topics for validating the documents:

- **Top level toolbar options for unsubmitted items**

Watch the [video](#) to learn about the various toolbar options for unsubmitted items in the Browse Area.

- **Page Manipulation View for unsubmitted items in the Browse Area**

This option will navigate you to Page Manipulation View for unsubmitted items where you can perform various operations such as cut, copy, paste, rotate, etc. on the unsubmitted items. Click [here](#) to know more about it.

- **Settings Panel in the item viewer**

Watch the [video](#) to learn about the Settings Panel for the item viewer(unsubmitted items) in the Browse Area.

- **Using Image page options for unsubmitted items**

Image page option toolbar in the browse area item viewer enables the user to add annotation symbols, drawings on the current document. User can use annotation symbol such as Text, Note, Pen, Ellipse, Line, Arrow, Polygon, Rectangle, Highlighter etc. Click [here](#) to know more about using annotations on the document.

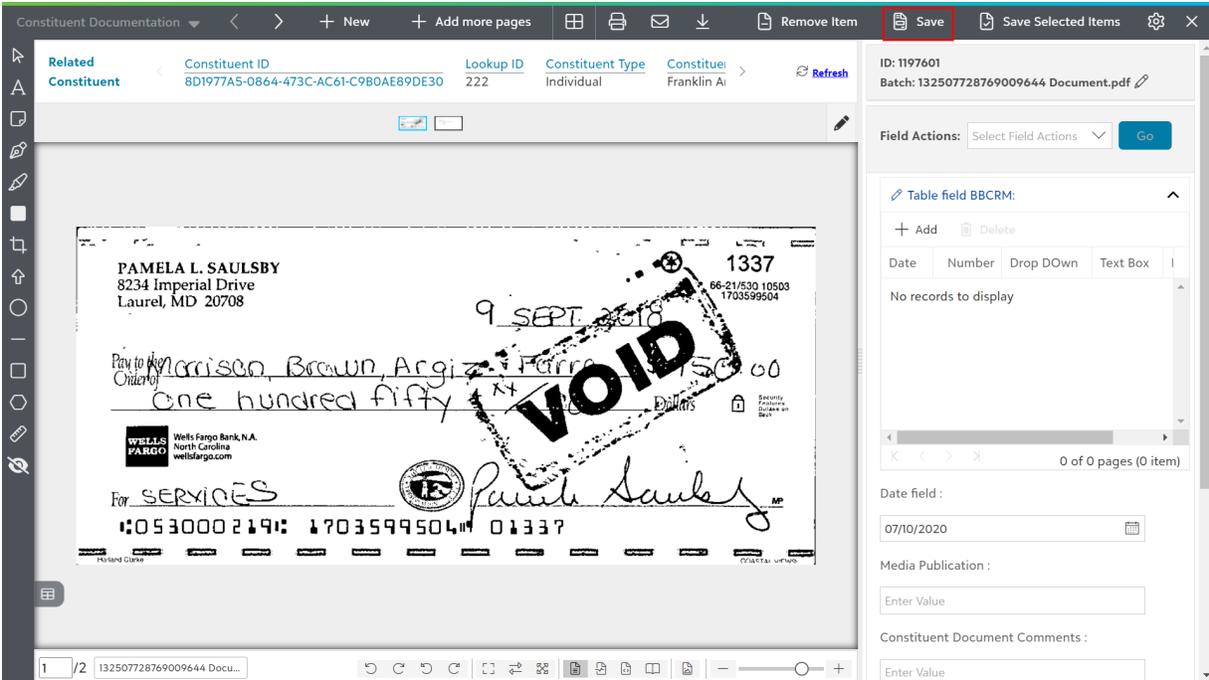
## Saving the document to an Integrated App record

You can save the document to the Integrated App record once you are done validating the document.

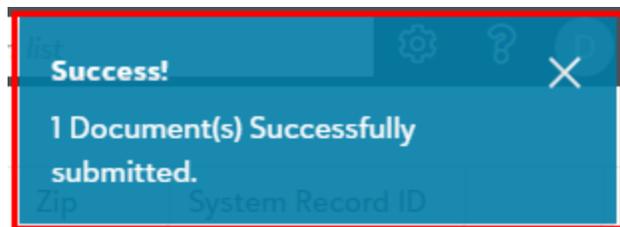
Watch the [video](#) explains to learn how to save an acquired document in the Search Area.

Follow the below steps to add a document to the Integrated App record:

- 1) Click on the **Save** option in the top level toolbar of the document viewer, as shown below.



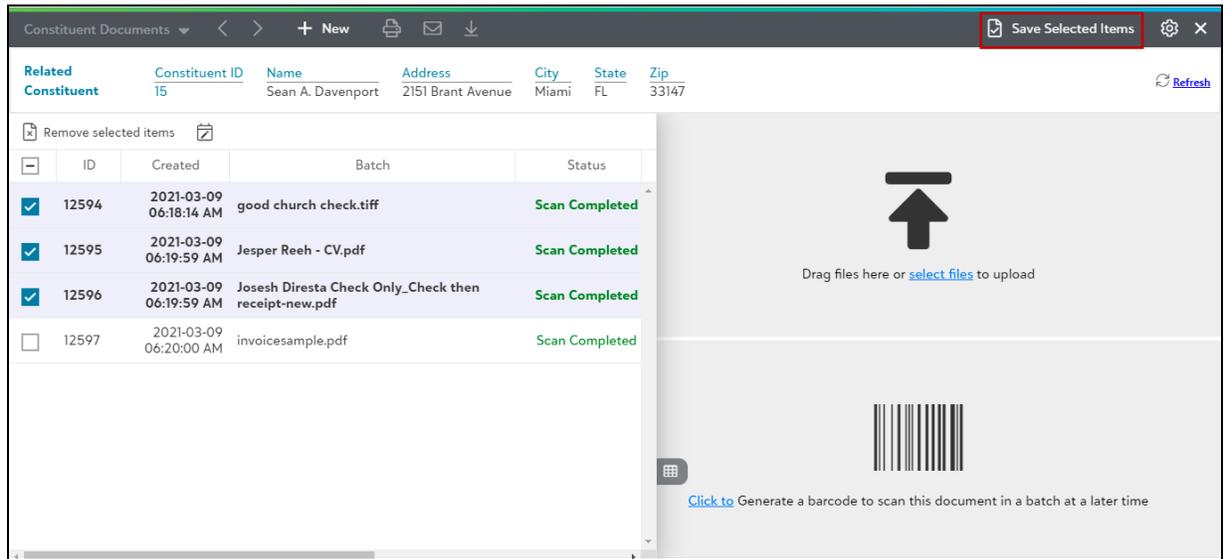
2) You will see a toast notification in the top-right corner of the screen showing the submission success as shown below. Similarly, it will display a failure notification in case of the submission failure. You can see the newly added document in the integrated app record.



## Save Multiple documents

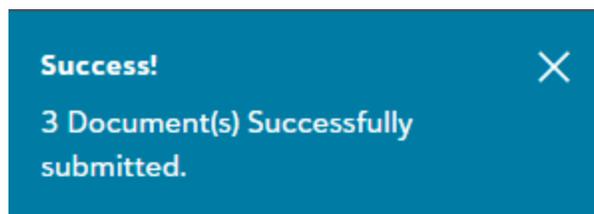
Follow the below steps to Save multiple unsubmitted documents to an Integrated App record.

- 1) Open the Unsubmitted item list to access the items.
- 2) Select the documents using the checkboxes from the unsubmitted item list as shown in the below screen.



3) Click on "**Save Selected Items**" to submit the multiple items selected from the unsubmitted item list.

4) You will see the following toast notification as shown in the below screen titled "**X Documents Successfully submitted**" where X is the number of documents that were successfully submitted.



## Viewing Related document for an Integrated App record

You can view the documents that are associated to any instance of type of record in an integrated application that PaperSave is integrated into. Follow the below steps to view the related documents for an integrated app record:

1) **Choose** the **context** from the tree view for the desired record type in an integrated application.

- 2) **Select** one or more **records** for which you wish to see the related documents.
- 3) A record list slide up panel will pop-up in the bottom of screen.
- 4) Click on "**VIEW RELATED DOCUMENTS**", as shown below.

The screenshot displays the Blackbaud Enterprise CRM interface. The left sidebar shows a tree view under 'Choose Context' with 'Constituent' selected. The main table lists records with columns for Document Count, Lookup ID, Constituent Type, Constituent Name, Last, First, Middle, DOB, and Street. The record for 'Jennifer and Spencer Kovalak' is selected, and the 'VIEW RELATED DOCUMENTS' button at the bottom is highlighted with a red box. A note in the bottom left corner states: 'Please note that the data shown for integrated app records is what was captured at the last time that PaperSave user interfaces were initiated from those records. It may be stale. Use the "Refresh Field Data" option to get the most updated information from the integrated app for that record.'

	Document Count	Lookup ID	Constituent Type	Constituent Name	Last	First	Middle	DOB	Street
<input type="checkbox"/>	30	151							
<input type="checkbox"/>	29	159							
<input type="checkbox"/>	30	156							
<input type="checkbox"/>	30	15							
<input type="checkbox"/>	30	155							
<input type="checkbox"/>	30	154							
<input checked="" type="checkbox"/>	6	8-10000483	Group-Household	Jennifer and Spencer Kovalak					Columbus
<input type="checkbox"/>	609	222	Individual	Franklin Andrews	Andrews	Franklin			
<input type="checkbox"/>	29	158							
<input type="checkbox"/>	5								

- You can view the list of related documents for the selected records, as shown below.

Constituent Documentation Search within document list

Related Constituent Constituent ID: 7CE96AF9-DE61-414E-88C0-19DB197EC966 Lookup ID: 8-10000483 Constituent Type: Group-Household Constituent Name: Jennifer And Spencer Kovalak Last First Middle Street Columbus G Refresh

+ NEW FILTER REFRESH CHOOSE FIELDS SHOW GROUPING EXPORT TO EXCEL INTERRELATED

<input type="checkbox"/>	ContentType	File Name	File Size	Created	Created By	Constituent Doc Type	Media Publication	Constituent Document Comments
<input type="checkbox"/>		132507728689918446 Document.pdf	0.04 MB	09/14/2023 07:59:24 AM	Vrunda Bhalani	Other		
<input type="checkbox"/>		132507728689918446 Document.pdf	0.04 MB	09/14/2023 05:05:56 AM	Vrunda Bhalani	Other		
<input type="checkbox"/>		132507728769009644 Document.pdf	0.04 MB	09/14/2023 05:05:55 AM	Vrunda Bhalani	Other		
<input type="checkbox"/>		132507728740439908 Document.pdf	0.03 MB	09/14/2023 05:05:54 AM	Vrunda Bhalani	Other		
<input type="checkbox"/>		132507728740439908 Document.pdf	0.03 MB	09/08/2023 03:49:17 AM	Vrunda Bhalani	Other		
<input type="checkbox"/>		132507728769009644 Document.pdf	0.04 MB	09/08/2023 02:58:35 AM	Vrunda Bhalani	Other		

1 of 1 pages (6 items)

**Tip:** You can see the related documents for a **single record** in the chosen integrated application context by double clicking on that particular record.

## Viewing Interrelated documents for an Integrated App record

You can view the documents that are indirectly related to any instance of type of record in an integrated application that PaperSave is integrated into.

**Note:** This option is dependent on the interrelationships that have been defined the "Configure Multi-Association" module (currently, under development) in the Configuration Area.

Follow the below steps to view the interrelated documents for an integrated app record:

- 1) **Choose** the **context** from the tree view for the desired record type in an integrated application.
- 2) **Select** the **record** for which you wish to see the inter-related documents.

3) A record list slide up panel will pop-up in the bottom of screen with the operations that can be performed on the single record.

4) Click on "**VIEW INTERRELATED DOCUMENTS**", as shown below.

The screenshot displays the Blackbaud Enterprise CRM interface. The main window shows a list of records under the 'Constituent' context. The selected record is for Franklin Andrews, with a document count of 609. The 'VIEW INTERRELATED DOCUMENTS' button is highlighted with a red box. A black text box on the left provides a note about data freshness.

Document Count	Lookup ID	Constituent Type	Constituent Name	Last	First	Middle	DOB	Street
30	156							
30	15							
30	155							
30	154							
5								
6	8-10000483	Group-Household	Jennifer and Spencer Kovalak					Columbus
609	222	Individual	Franklin Andrews	Andrews	Franklin			
29	158							
5								
29	157							
30	150							
30	152							

Please note that the data shown for integrated app records is what was captured at the last time that PaperSave user interfaces were initiated from those records. It may be stale. Use the "Refresh Field Data" option to get the most updated information from the integrated app for that record.

1 of 1 pages (16 items)

VIEW INTERRELATED DOCUMENTS

5) It will display the list of interrelated documents for the selected record, as shown below.

Constituent Documentation Search within document list

Related Constituent Constituent ID: 7CE96AF9-DE61-414E-88C0-19DB197EC966 Lookup ID: 8-10000483 Constituent Type: Group-Household Constituent Name: Jennifer And Spencer Kovalak Last: First: Middle: Street: Columbus C: G Refresh

+ NEW FILTER REFRESH CHOOSE FIELDS SHOW GROUPING EXPORT TO EXCEL INTERRELATED

<input type="checkbox"/>	ContentType	File Name	File Size	Created	Created By	Constituent Doc Type	Media Publication	Constituent Document Comments
<input type="checkbox"/>		132507728689918446 Document.pdf	0.04 MB	09/14/2023 07:59:24 AM	Vrunda Bhalani	Other		
<input type="checkbox"/>		132507728689918446 Document.pdf	0.04 MB	09/14/2023 05:05:56 AM	Vrunda Bhalani	Other		
<input type="checkbox"/>		132507728769009644 Document.pdf	0.04 MB	09/14/2023 05:05:55 AM	Vrunda Bhalani	Other		
<input type="checkbox"/>		132507728740439908 Document.pdf	0.03 MB	09/14/2023 05:05:54 AM	Vrunda Bhalani	Other		
<input type="checkbox"/>		132507728740439908 Document.pdf	0.03 MB	09/08/2023 03:49:17 AM	Vrunda Bhalani	Other		
<input type="checkbox"/>		132507728769009644 Document.pdf	0.04 MB	09/08/2023 02:58:35 AM	Vrunda Bhalani	Other		

1 of 1 pages (6 items)

You can explore options available in the document [list toolbar](#) and document list [slide up panel](#).

**Tip:** You can double-click on any document from the list to open it in the item viewer.

## Refresh Field Data

The Integrated record list shows the record field values captured at the time of associating PaperSave document to an integrated application record. Now, it is possible that the record field values have changed later directly from the Integrated application. In such cases, you will require the most updated values for these record fields.

Refresh Field Data option enables you to get the latest field values from the integrated app record. Follow the below steps to update the field data for the desired records in the list:

- 1) **Select** the desired records from the list for which you want the latest field values.
- 2) A slide up toolbar will pop-up from the bottom of the screen.
- 3) Click on "**REFRESH FIELD DATA**" option, as shown below.

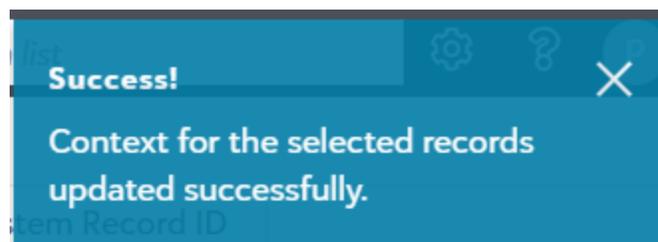
Please note that the data shown for integrated app records is what was captured at the last time that PaperSave user interfaces were initiated from those records. It may be stale. Use the "Refresh Field Data" option to get the most updated information from the integrated app for that record.

Document Count	Lookup ID	Constituent Type	Constituent Name	Last	First	Middle	DOB	Street
30	155							
30	154							
5								
6	8-10000483	Group-Household	Jennifer and Spencer Kovalak					Columbus
609	222	Individual	Franklin Andrews	Andrews	Franklin			
29	158							
5								
29	157							
30	150							
30	152							
2	8-10000141	Individual	Joseph Abrahms	Abrahms	Joseph			

1 of 1 pages (16 items)

REFRESH FIELD DATA

4) It updates the field values in the list for the selected records from the integrated application. Also, a toast notification shall pop-up in the top right corner stating "**Success! Context for the selected records updated successfully**".



5) Similarly, it will display a notification "**Failure! There was an error while updating the context for the selected records updated. Please try again.**" in case of the failure to update the field data for the selected records.

**Note:** The record list, list toolbar, Application bar, and choose context menu shall freeze while the field data update completes for the selected records.

## List toolbar options in Browse Area

The Browse Area offers list toolbar, as shown below.

The screenshot displays the Blackbaud Enterprise CRM interface. The top navigation bar includes 'PaperSave', 'Browse', and the current page title 'Blackbaud Enterprise CRM - Records - Constituent'. A search bar on the right contains the text 'Search within list'. Below the navigation bar, a list toolbar is visible, featuring three icons: a funnel for 'FILTER', a document with a plus sign for 'EXPORT TO EXCEL', and a document with a minus sign for 'CHOOSE FIELDS'. These three options are highlighted with a red box. The main area shows a table of constituent records with columns for Document Count, Lookup ID, Constituent Type, Constituent Name, Last, First, Middle, DOB, and Street. The 'Constituent' folder is selected in the left-hand navigation pane. A black text box in the bottom-left corner contains the following text: 'Please note that the data shown for integrated app records is what was captured at the last time that PaperSave user interfaces were initiated from those records. It may be stale. Use the "Refresh Field Data" option to get the most updated information from the integrated app for that record.'

	Document Count	Lookup ID	Constituent Type	Constituent Name	Last	First	Middle	DOB	Street
<input type="checkbox"/>	30	155							
<input type="checkbox"/>	30	154							
<input type="checkbox"/>	5								
<input type="checkbox"/>	6	8-10000483	Group-Household	Jennifer and Spencer Kovalak					Columbus
<input type="checkbox"/>	609	222	Individual	Franklin Andrews	Andrews	Franklin			
<input type="checkbox"/>	29	158							
<input type="checkbox"/>	5								
<input type="checkbox"/>	29	157							
<input type="checkbox"/>	30	150							
<input type="checkbox"/>	30	152							
<input type="checkbox"/>	2	8-10000141	Individual	Joseph Abrahms	Abrahms	Joseph			
<input type="checkbox"/>	30	153							

The following are the options available in the list toolbar for integrated application records in Browse Area:

- **FILTER**

You can narrow down the items in the list by applying filter conditions. Learn more about [Filter](#).

Watch the [video](#) to learn about the Filter option in the Browse Area.

- **EXPORT TO EXCEL**

This option is useful when you want to share data with users outside of the system in cases such as an audit. This option will export the list of items to a Microsoft Excel file (based on columns in the display) with a hyperlink to view the items. Learn more about [Export to Excel](#).

- **CHOOSE FIELDS**

You can set desired preferences for the fields to be displayed in the current list using Choose Fields. Learn more about [Choose Fields](#).

Watch the [video](#) to learn about the Choose fields option in the Browse Area list toolbar.

## Application bar in Browse Area

The Browse Area presents an Application bar, as shown below.

The screenshot shows the PaperSave application interface. The top navigation bar includes 'PaperSave', 'Browse', and the current context 'Blackbaud Enterprise CRM - Records - Constituent'. A search bar is located on the right. The left sidebar shows a 'Choose Context' menu with various folders like 'Records', 'Appeal Mail List', 'Committee', 'Constituent', etc. The main area displays a table of records with the following columns: Document Count, Lookup ID, Constituent Type, Constituent Name, Last, First, Middle, DOB, and Street. A note at the bottom left of the table area states: 'Please note that the data shown for integrated app records is what was captured at the last time that PaperSave user interfaces were initiated from those records. It may be stale. Use the "Refresh Field Data" option to get the most updated information from the integrated app for that record.'

Document Count	Lookup ID	Constituent Type	Constituent Name	Last	First	Middle	DOB	Street
30	155							
30	154							
5								
6	8-10000483	Group-Household	Jennifer and Spencer Kovalak					Columbus
609	222	Individual	Franklin Andrews	Andrews	Franklin			
29	158							
5								
29	157							
30	150							
30	152							
2	8-10000141	Individual	Joseph Abrahms	Abrahms	Joseph			
30	153							

The following is a description of each option in the Browse Area Application bar:

### 1) NAVIGATION MENU

You can navigate to other PaperSave areas such as Acquire, Search, Configuration, Workflow, Reports, Forms, and Utilities. Click [here](#) to know more.

### 2) SELECTED CONTEXT

The currently selected context for an integrated App is displayed in the format of "Integrated App - Module - Record type," as shown below.

**Blackbaud Enterprise CRM - Records - Constituent**

If the Integrated application does not contain any module, then it shall display Context in the format of "**Integrated App - Record Type**".

Blackbaud Enterprise CRM - Constituent

Similarly, if the Context is selected for PaperSave (non-integrated application), then it shall display "**PaperSave - Document Type**".

PaperSave - Functional Design

### 3) INTEGRATED APPLICATION INSTANCES

You will see a list of available Integrated app instances when more than one integrated application instances are registered with PaperSave. You can choose the desired instance from the list to browse the integrated app records and documents for that particular instance.

**Note:** If there is only one registered instance, then no instance name will appear in the application bar.

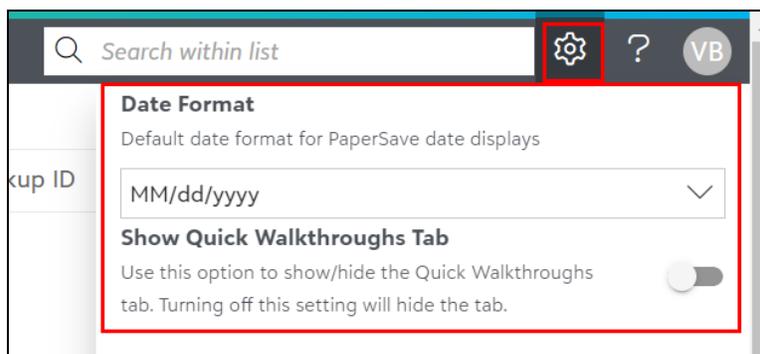
### 4) QUICK SEARCH

Enter a keyword and click on Search icon or press You can promptly find a Workflow item from the list of Workflow items by using relevant keywords in the Quick Search. Click [here](#) to know more.

### 5) SETTINGS



Click on  icon in the top right corner of Navigation bar to define Workflow and User specific preferences as shown below:



Following is the description of various options in the Browse Area Settings panel.

#### a) **Date Format**

This option enables you to set the desired date format for date display in this app. By default, it is MM/d-d/yyyy. Select the preferred date format from the following options:

- MM-dd-yyyy
- MM/dd/yyyy
- dd-MM-yyyy
- dd/MM/yyyy
- yyyy-MM-dd

b) **Show Quick Walkthrough Tab** : Use the toggle button to show/hide the Quick walkthrough tab.

#### 6) **HELP**

You can seek PaperSave related assistance for Product information, User Guide, Knowledge base, and Customer portal etc in the Help menu. Click [here](#) for more details.

## 7) **USER PROFILE**

You can access the current user related information in User Profile. Click [here](#) for more details.

Watch the [video](#) to learn about the User profile in Browse Area.

## **Browsing PaperSave (standalone) documents**

The Browse area facilitates you to browse through PaperSave documents for desired document types.

Watch the [video](#) covers to learn how to browse PaperSave standalone documents.

You can choose the PaperSave Context from the tree view on the left corner of the screen as shown below:

Content Type	File Size	Created	Created By	Contract Type	Contract Start Date	Contract End Date	Auto Renew	Comment o
	0.31 MB	01/23/2023 02:05:46 AM	Vrunda Bhalani	Draft	10/07/2015			
	0.07 MB	01/16/2023 12:48:20 AM	Vrunda Bhalani	Draft	10/07/2015			
	0.09 MB	01/04/2023 01:29:03 AM	Vrunda Bhalani	Draft	10/07/2015			
	0.07 MB	12/23/2022 07:54:26 AM	Vrunda Bhalani	Draft	10/07/2015			
	0.31 MB	12/16/2022 09:30:46 AM	Vrunda Bhalani	Draft	10/07/2015			
	0.31 MB	12/02/2022 03:19:48 AM	Vrunda Bhalani	Draft	10/07/2015			
	0.01 MB	07/01/2022 03:20:39 AM	Vrunda Bhalani	Final	10/07/2015			
	0.16 MB	06/11/2022 03:46:07 AM	Vivek Soni	Draft	10/07/2015			
	0.60 MB	04/27/2022 03:19:42 AM	Vrunda Bhalani	Draft	10/07/2015			
	0.55 MB	04/11/2022 06:01:41 AM	Vrunda Bhalani	Draft	10/07/2015			
	0.19 MB	08/06/2021 09:07:07 AM	Vrunda Bhalani	Draft	10/07/2015	08/06/2021	Yes	test vb
	0.02 MB	06/07/2021 06:38:31 AM	Nitin Shudra	Draft	10/07/2015	06/07/2021	No	
	0.31 MB	06/04/2021 10:36:52 AM	Denish Makwana	Draft	10/07/2015			

The Area displays a list of documents for PaperSave context for the selected document type.

**Tip:** Document Count column will display the total number of documents attached to that particular record for any chosen context.

**Note:** The Browse Area displays only those document type for which the current user has the rights to view documents for.

# Search Area

This section is designed to get the audience up and running with PaperSave Search Area. You can learn about the key features and functionalities of our all new PaperSave Search Area.

## Introduction to Search Area

The Search Area facilitates you to seek the required documents using relevant keywords. It enables you to search the documents based on a certain criteria by narrowing down the search result. Moreover, The Search Area lets you search against the Integrated App record fields that are captured by PaperSave when documents are associated to a record. You can opt to search the documents based on the available modules or record types of an integrated application. Similarly, You can find the documents attached to PaperSave (Non-Integrated Application) based on the various document types.

It enables you to add the documents to an existing record in an integrated application. It offers various file capture options such as Scan using TWAIN scanner or Fujitsu fi-NX series scanner, upload files from your file explorer, and generate barcode to scan the document at a later time. You are offered to batch these documents within the app or bring them into the app without assigning them to a batch.

You can also annotate the documents to highlight important information, redact sensitive data, write comments directly on the document pages, and more. You can review and edit the document fields and submit the document to an integrated App record. You can view documents that are directly or indirectly related to any instance of the type of record in an Integrated Application that PaperSave is integrated into.

Search Area offers you the flexibility to search within the content of the document, typically useful for "needle in the haystack" type searches. When you open a document from the search result (content search), then it displays the searched keyword highlighted within the document. Also, You can save searches that need to be

executed frequently or retrieved at a later time. You can precisely load the saved searches so that you are uninterrupted during a complicated set of searches, thereby saving you from entering the search query again.

The following topics will help you explore the detailed features associated with each step in the Search Area:

- [Getting started with Search Area](#)
- [Searching documents with Simple Search](#)
- [Searching documents with Advanced Search](#)
- [Searching documents for Integrated App records](#)

## Getting Started with Search Area

This guide contains details on all the functions and uses of the Search Area. It is organized into sections that deeply describe options available around each major function in the Search Area.

The best place to start learning is by going through the Quick Walkthrough of the Search Area and watching all of the “how-to” video tutorials presented for different types of searches. This will give you a good overview of the Search Area’s typical flow.

Watch the [video](#) to learn how to get started with the Search Area.

## Searching documents with Simple Search

The Simple search enables you to use keyword(s) to find documents outside of the Integrated Application based on a combination of one or more of the following:

- Integrated Application Record Information
- Profile field values based on Workflow and Document Type
- Content that is within the body of the document

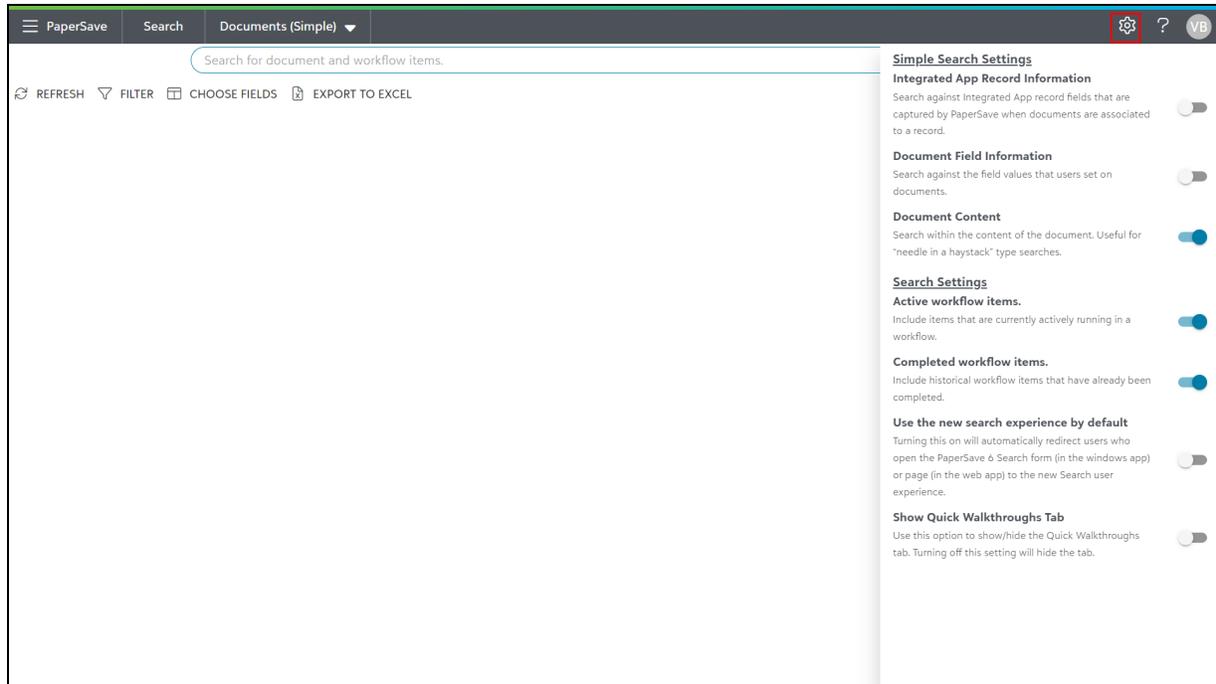
Watch the [video](#) to learn about finding the documents using Simple Search.

The following are the topics covered in the Documents (Simple) search section:

- [Simple Search Settings](#)
- [Performing Simple Search](#)
- [Content Search](#)
- [List toolbar options in Simple Search](#)

## Simple Search Settings

You can define your user preferences for your search criteria from the settings panel underneath the gear icon. .



## a) Simple Search Settings

The following options are specific to Simple Search:

- **Integrated App Record Information**

Turn **ON** this option to search against integrated application fields captured by PaperSave when documents are associated with an integrated application record.

**Note:** In case of a single Integrated Application configured with PaperSave, the setting name will be displayed as “[**Integrated Application Name**] Record Information”. For example, if the only Integrated Application configured with PaperSave is “Dynamics GP”, then the setting’s name would be “Dynamics GP Record Information”. In the case of multiple integrated applications configured with PaperSave, the setting name will be displayed “Integrated App Record Information”.

- **Document Field Information**

Turn **ON** this option to search against the field values that users set on the documents.

- **Document Content**

Turn **ON** this option to search for the entered keywords within the content of the documents. Typically, this is useful for “**needle in a haystack**” type searches. Learn more about the [Content Search](#).

**Note:** To perform the Content Search only, you need to turn on the Document Content, and turn off the “Document Field” and “Integrated App Record” information options.

## b) Search Settings

The options available in the Search settings section apply to all search types including Advanced and Integrated App Searches:

- **Active Workflow items**

Turn “ON” this option to include items currently active in a Workflow even if they aren’t yet associated with an Integrated Application Record.

**Note:** This setting requires the current user to have the Workflow access rights “**Groups/Users that can view items in the workflow that they do not own.**”

- **Completed Workflow items**

Turn “**ON**” this option to include items in the search results in the completed step of a Workflow.

**Note:** This setting requires the current user to have the Workflow access rights "**Group/Users who can view into the completed step in the workflow.**"

- **Use the new search experience by default**

Turn ON this option to be redirected to the new PaperSave 7 Search experience when accessing the PaperSave 6 Search.

**Note:** The options you select in the Settings Panel will be available for all search types. Hence, any changes made when in any search area will be reflected globally for the current user.

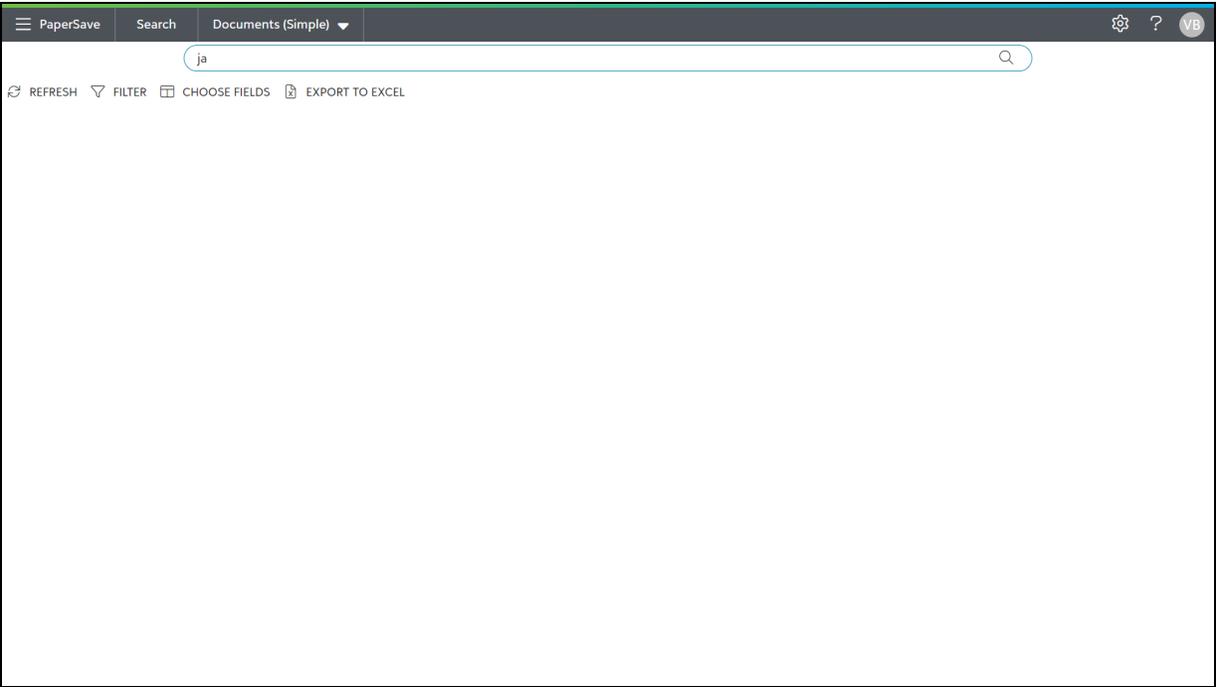
- **Show Quick Walkthroughs Tab**

Turn on this option to show/hide the Quick Walkthroughs tab. Turning off this setting will hide the tab.

## Performing Simple Search

When you navigate to the Search Area, Documents (Simple) is loaded by default. Follow the below steps to perform a simple search:

- 1) Ensure that you have set your desired preferences in the Settings panel underneath the gear icon. Refer to [this](#) section to learn more about simple search settings.
- 2) **Enter** the desired keyword in the search box.



3) Click on search  icon or press enter to see the results.

4) The search result will show a list of documents or Workflow items based on the entered keyword(s), as shown below:

PaperSave Search Documents (Simple)									
ja									
REFRESH FILTER CHOOSE FIELDS EXPORT TO EXCEL									
<input type="checkbox"/>	ContentType	ID	Batch	WorkflowItem ID	CreatedOn	CreatedBy	Integrated Database	Integrated Application	Module
<input type="checkbox"/>		<a href="#">23696</a>			04/07/2016 03:21:40 PM	Cecile Burgess	PaperSave	PaperSave	General
<input type="checkbox"/>		<a href="#">26165</a>		22991	01/04/2018 01:55:18 PM	Lu Ann George		Dynamics GP	Purchasing
<input type="checkbox"/>		<a href="#">26210</a>		23015	01/19/2018 03:55:12 PM	Tammy Bower		Dynamics GP	Purchasing
<input type="checkbox"/>		<a href="#">26221</a>		23023	01/24/2018 02:07:45 PM	Tammy Bower		Dynamics GP	Purchasing
<input type="checkbox"/>		<a href="#">26233</a>			02/07/2018 04:55:46 PM	Cecile Burgess	PaperSave	PaperSave	General
<input type="checkbox"/>		<a href="#">825461</a>	MSDN_2.pdf		01/13/2022 01:37:35 AM	Rina Panchal	1 FENXT Support Test Environment	Blackbaud's The Financial Edge	Accounts P
<input type="checkbox"/>		<a href="#">825854</a>		593309	01/13/2022 03:25:20 AM	Denish Makwana		Blackbaud's The Financial Edge	Accounts P
<input type="checkbox"/>		<a href="#">878707</a>		646098	01/25/2022 10:47:36 AM	Denish Makwana		Intacct	Accounts P
<input type="checkbox"/>		<a href="#">903474</a>		670574	01/31/2022 03:08:09 AM	Denish Makwana		Intacct	Accounts P
<input type="checkbox"/>		<a href="#">1166742</a>	2205301046	926564	05/30/2022 01:16:26 AM	Nikita Prajapati		Blackbaud's The Raiser's Edge	Records
<input type="checkbox"/>		<a href="#">1166744</a>	2205301046		05/30/2022 01:19:30 AM	PaperSave System	RENXT Support Test Environment 1	Blackbaud's The Raiser's Edge	Records
<input type="checkbox"/>		<a href="#">1175099</a>		027129	10/10/2022	Vrunda Bhalani		Blackbaud's The Financial Edge	Accounts P

Follow the below steps to find documents related to multiple keywords:

1) The PaperSave Search area also supports Multiple searches at the same time by entering multiple keywords separated by commas, as shown in the below screen. Once you have entered your keywords, click on search  icon or press enter to begin the search.

2) The search results will include the keyword(s) you have entered in the search bar, as shown in the below screen.

Content Type	ID	Batch	Workflow Item ID	Created On	Created By	Integrated Database	Integrated App
	<a href="#">23696</a>			04/07/2016 03:21:40 PM	Cecile Burgess	PaperSave	PaperSave
	<a href="#">24646</a>		22199	10/17/2016 04:31:07 PM	Wadih Pazos		Intacct
	<a href="#">24953</a>		22417	11/17/2016 11:01:23 AM	Tammy Bower		Intacct
	<a href="#">24955</a>		22419	11/17/2016 11:02:42 AM	Tammy Bower		Intacct
	<a href="#">25294</a>		22602	04/05/2017 03:05:18 PM	Tammy Bower		Intacct
	<a href="#">25543</a>		22686	08/24/2017 01:54:45 PM	Holly Condon		Intacct
	<a href="#">25559</a>		22698	08/24/2017 04:38:23 PM	Holly Condon		Intacct
	<a href="#">25576</a>			08/29/2017 01:36:43 PM	Holly Condon	PaperSave	PaperSave
	<a href="#">25733</a>		22803	10/09/2017 04:43:55 AM	Holly Condon		Dynamics GP
	<a href="#">25919</a>			11/07/2017 09:41:15 AM	Tammy Bower	PaperSave	PaperSave
	<a href="#">26165</a>		22991	01/04/2018 01:55:18 PM	Lu Ann George		Dynamics GP
	<a href="#">26210</a>		23015	01/19/2018	Tammy Bower		Dynamics GP

It is also possible to search within the document's content by enabling the "**Document Content**" option from the settings panel. Learn more about [Content Search](#).

## Content Search

Simple Search enables you to search the content within the documents or the workflow items.

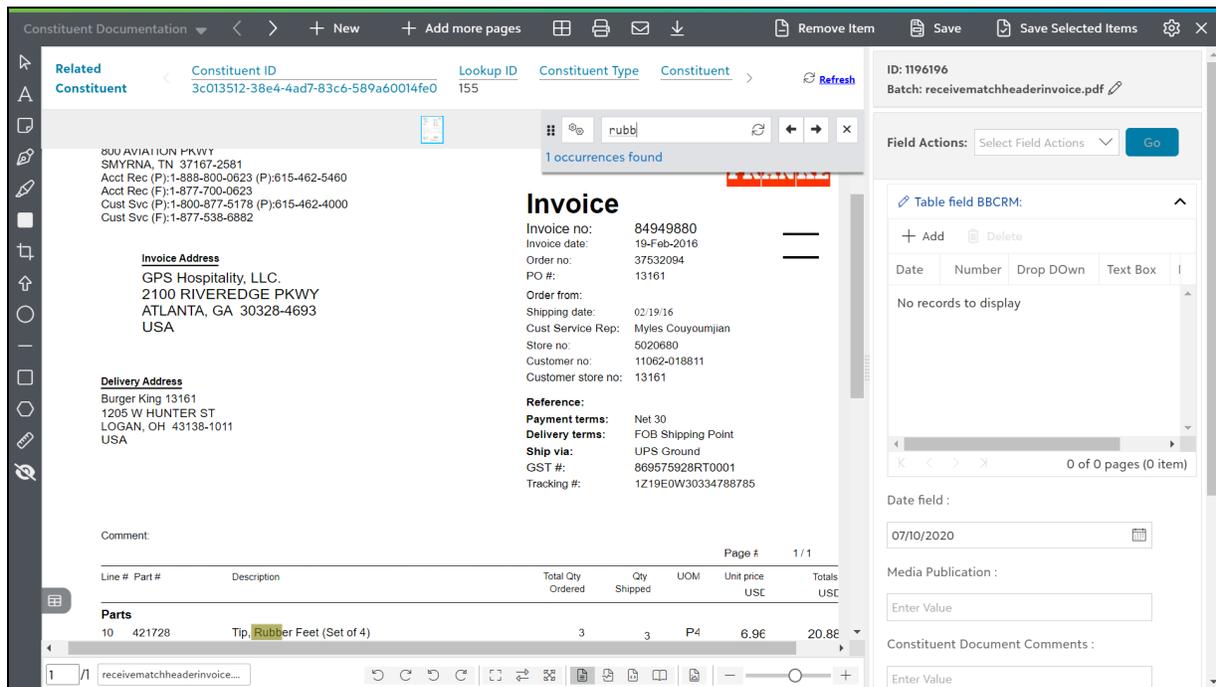
Follow the below steps to perform the Document Content Search:

**Note:** To perform the Content Search only, you need to turn on the Document Content, and turn off "Document Field" and "Integrated App Record information" from the settings panel underneath the gear icon.



1) **Enter** the keyword(s) that you wish to find within the document in the search bar.

- 2) **Click** on the **Search** icon or press **Enter**.
- 3) It will now display a list of documents or workflow items containing the entered keyword(s).
- 4) **Double-click** on the desired item from the search result list to open it in the item viewer.
- 5) The search keyword(s) will be highlighted in the document content when found, as shown in the below screen.



**Tip:** You can use the search widget's arrows to traverse across the highlighted keywords within the document.

PaperSave utilizes the following search mechanisms for content searches:

- 1) Nearby Search
- 2) Exact Search

**Nearby Search:** Nearby search helps you find a list of documents or workflow items with such content that precisely matches the entered keyword(s) as well as other possible combinations related to the keyword(s).

**For Example:** Follow the below steps to perform the Nearby Search to search documents or workflow items with the keyword **part**.

- 1) Enter the keyword **part** in the search box in the Documents (Simple) menu.
- 2) Click on the **Search** icon or press **Enter**.
- 3) It will display a list of documents or workflow items containing the exact keyword **part** and other possible combinations around that keyword such as **party, parts, parties**, etc.

**Exact Search:** Exact search helps you find a list of documents or workflow items with content that precisely matches the entered keyword(s) only.

**For Example:** Follow the below steps to perform the Exact Search to search documents or workflow items with the keyword **rubber**.

1. Enter the keyword "**rubber**" (wrapped in double quotes) in the search box in the Documents (Simple) menu.
2. Click on the search icon or press Enter.
3. It will display a list of documents or workflow items that contain the exact keyword **rubber**.

The following table outlines how to use both the search mechanisms for the content search:

Content Search Mechanism	How to perform the Search?	Search Result
Nearby Search	Enter keyword(s) <b>without double quotes</b> and click on the <b>Search</b> icon or press <b>Enter</b> .	It displays a list of documents with content that matches the keyword(s) and possible words around it.

	For Example, bill	
Exact Search	Enter keyword(s) <b>with double quotes</b> and click on the <b>Search</b> icon or press <b>Enter</b> . For Example, "bill"	It displays a list of documents with content that matches the keyword(s) only.

**Tip:** Enter multiple keywords separated by comma (For Example, **part, rubber**) in the search box and press Enter or click on the search icon to perform a content search with multiple keywords.

**Note:** Nearby Search and Exact Search are case insensitive.

**Note:** PaperSave takes about 6-12 hours to show the newly acquired documents in the Content Search results.

## List toolbar options in Simple Search

The Simple Search offers a list toolbar, as shown below:

Content Type	ID	Batch	Workflow Item ID	Created On	Created By	Integrated Database	Integrated Application	Module
	<a href="#">23696</a>			04/07/2016 03:21:40 PM	Cecile Burgess	PaperSave	PaperSave	General
	<a href="#">26165</a>		22991	01/04/2018 01:55:18 PM	Lu Ann George		Dynamics GP	Purchasing
	<a href="#">26210</a>		23015	01/19/2018 03:55:12 PM	Tammy Bower		Dynamics GP	Purchasing
	<a href="#">26221</a>		23023	01/24/2018 02:07:45 PM	Tammy Bower		Dynamics GP	Purchasing
	<a href="#">26233</a>			02/07/2018 04:55:46 PM	Cecile Burgess	PaperSave	PaperSave	General
	<a href="#">825461</a>	MSDN_2.pdf		01/13/2022 01:37:35 AM	Rina Panchal	1 FENXT Support Test Environment	Blackbaud's The Financial Edge	Accounts P
	<a href="#">825854</a>		593309	01/13/2022 03:25:20 AM	Denish Makwana		Blackbaud's The Financial Edge	Accounts P
	<a href="#">878707</a>		646098	01/25/2022 10:47:36 AM	Denish Makwana		Intacct	Accounts P
	<a href="#">903474</a>		670574	01/31/2022 03:08:09 AM	Denish Makwana		Intacct	Accounts P
	<a href="#">1166742</a>	2205301046	926564	05/30/2022 01:16:26 AM	Nikita Prajapati		Blackbaud's The Raiser's Edge	Records
	<a href="#">1166744</a>	2205301046		05/30/2022 01:19:30 AM	PaperSave System	RENXT Support Test Environment 1	Blackbaud's The Raiser's Edge	Records
	<a href="#">1175099</a>		927129	10/10/2022	Vrunda Bhalani		Blackbaud's The Financial Edge	Accounts P

The following are the options in the Simple Search list toolbar:

- **REFRESH**

This option can be used to update the recent changes in the current list.

- **FILTER**

You can use narrow down the items in the list by applying filter conditions. Learn more about [Filter](#).

- **CHOOSE FIELDS**

You can set desired preferences for the fields to be displayed in the current list using Choose Fields. Learn more about [Choose Fields](#).

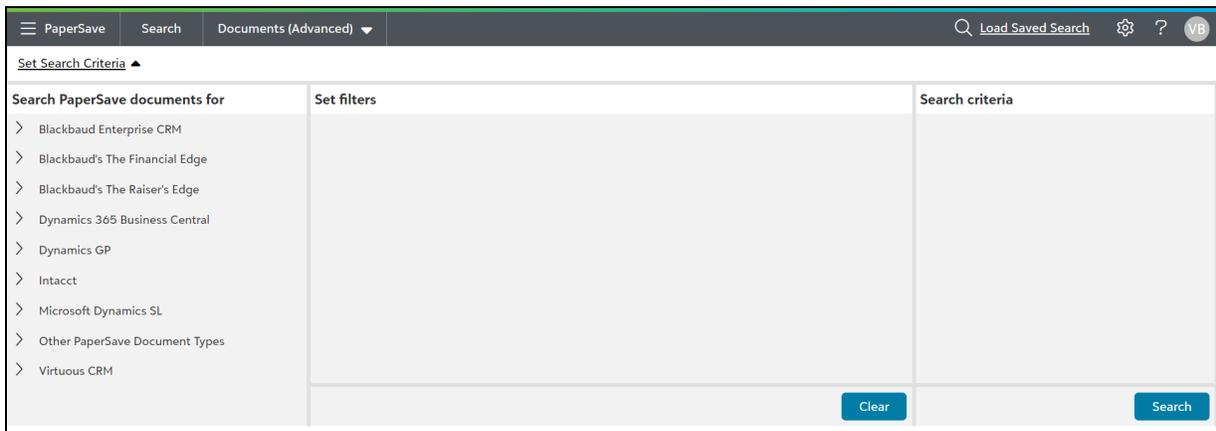
- **EXPORT TO EXCEL**

You can export the current list of items to a Microsoft Excel Sheet with a link to the documents. Learn more about [Export to Excel](#).

## Searching documents with Advanced Search

When you select Documents(Advanced) from the Search drop down in the Application bar, the "Set Search Criteria" Panel will be expand where you can select a context and add filters to create your query to narrow down the search for the PaperSave document(s).

Here, you can either directly apply the condition(s) or combine more than one condition(s) using grouping method. For your verification, PaperSave automatically displays the textual representation of the filters defined in the "Set filters" panel under the Search criteria panel.



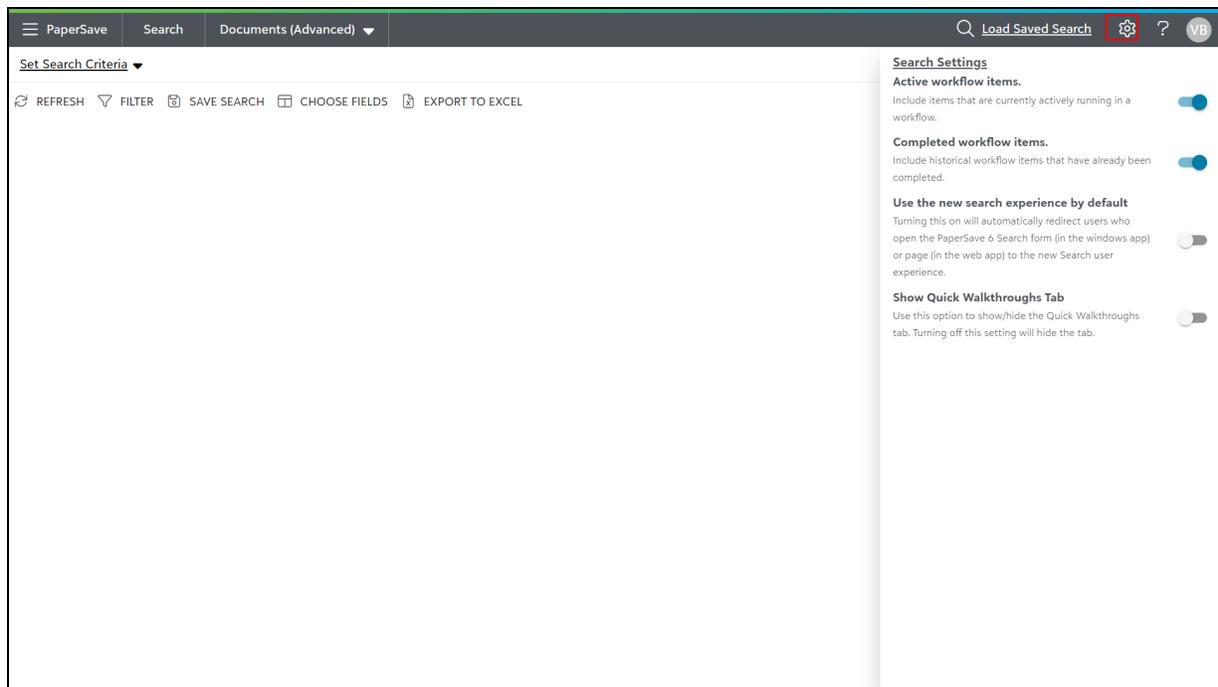
Watch the [video](#) to learn about how to find documents using Documents(Advanced) in the Search Area.

The following are the topics covered in Documents (Advanced) Search section:

- [Advanced Search Settings](#)
- [Performing Advanced Search](#)
- [Saved Search](#)
- [Advanced Search list toolbar](#)

## Advanced Search Settings

You can define various advanced search related preferences in the Settings panel. As you click on  in the Application bar, Settings panel will open in the right corner of the screen, as shown below.



The following is the description of the options in the Advanced Search setting:

### a) Search Settings

The options available in the Search settings section apply to all search types including Simple and Integrated App Searches:

- **Active Workflow items**

Turn **ON** this option to include items currently active in a Workflow even if they aren't yet associated with an Integrated Application Record.

**Note:** This setting requires the current user to have the Workflow access rights "**Groups/Users that can view items in the workflow that they do not own.**"

- **Completed Workflow items**

Turn **ON** this option to include Workflow items in the search results in the completed step of a Workflow.

**Note:** This setting requires the current user to have the Workflow access rights for "**Group/Users who can view into Completed step in Workflow.**"

- **Use the new search experience by default**

Turn ON this option to automatically redirect users who open the PaperSave 6 Search form (in the windows app) or page (in the web app) to the new Search user experience.

**Note:** The options you select in the Settings Panel will be available for all search types. Hence, any changes made when in any Search area will be reflected globally for the current user.

- **Show Quick Walkthroughs Tab**

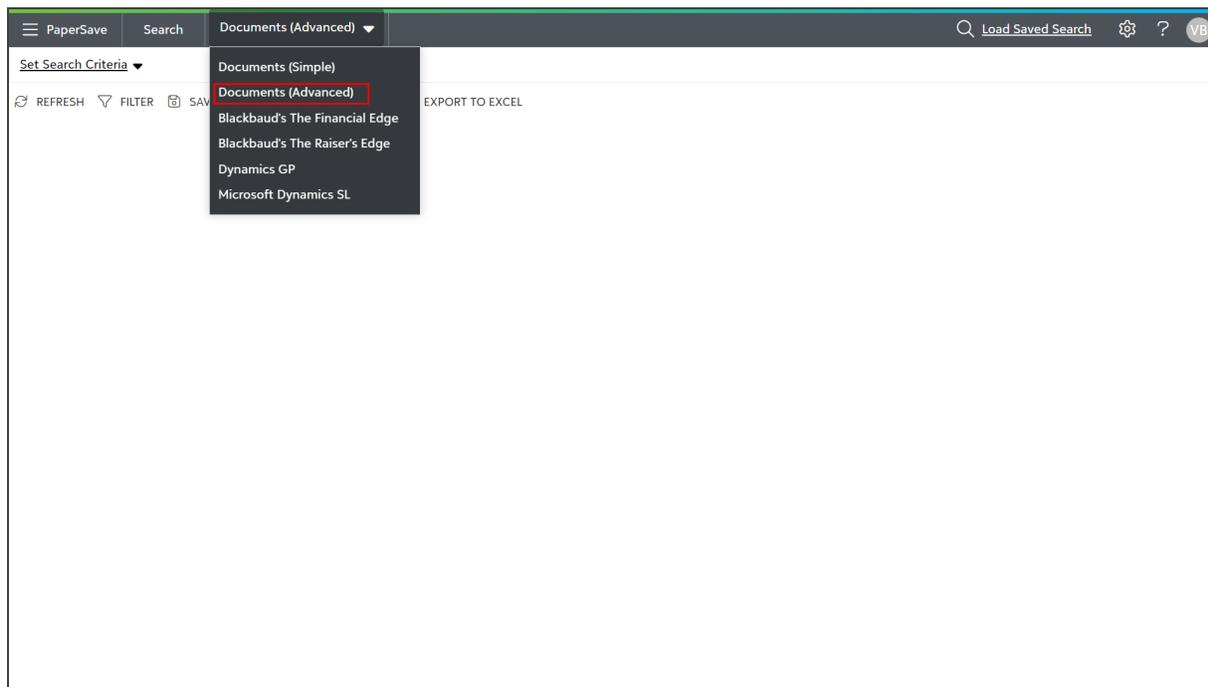
Turn ON this option to show/hide the Quick Walkthroughs tab. Turning off this setting will hide the tab.

## Performing Advanced Search

Advanced Search allows you to define a custom query and narrow down the search result by adding filter conditions. You can add filters for the Integrated application or PaperSave to search for specific item(s) within the

"Set Search Criteria" panel .

- 1) From the application bar, click on drop-down search option and select Document (Advanced) from the list.
- 2) Click on the **Set Search Criteria** option to expand the panel if its not visible.

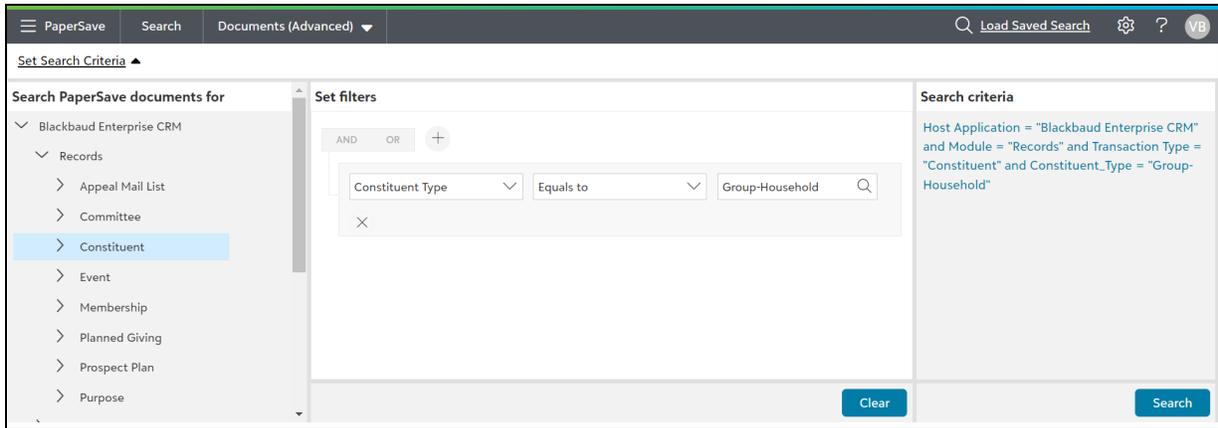


- 3) You can select the Module, Record Type and Document Type from the context menu on the lefty by clicking on the > arrow to expand the selection. Lets say for example ,you select Dynamics 365 Finance > Account Payable > Vendor > Venodr documentation from the context menu.

**Tip:** Once you have added your conditions, you can combine them by adding them to a group.

- 4) Now, apply filters by adding and grouping conditions in the "Set filters" panel to get relevant list of items in the search results. You can use "AND/OR" operators to narrow or broaden the search for the added conditions.

5) After defining the conditions, you can validate the query in the Search criteria panel click on the Search button to view the results.



6) The search results will appear in a document list.

**Note:** Click [here](#) to navigate to the next topic "Saved Search".

## Saved Search

Once you have performed an advanced search, you can save its criteria to be used later and not have to start from scratch. The Save Search feature is handy for complex queries that you intend to use repeatedly.

Watch the [video](#) to learn about the Saved Search feature in Advance Search.

The following are the topics covered in Documents (Advanced) Saved Search section:

- [Saving search queries](#)
- [Loading saved search queries](#)
- [Deleting saved search queries](#)

## **Saving search queries**

1) To save the search criteria, click on the "**Save Search**" option from the list toolbar, as shown below.

PaperSave Search Documents (Advanced) <span style="float: right;">Load Saved Search ? VB</span>									
Change Search Criteria									
REFRESH FILTER <b>SAVE SEARCH</b> CHOOSE FIELDS EXPORT TO EXCEL									
<input type="checkbox"/>	ContentType	ID	Batch	CreatedOn	CreatedBy	Integrated Database	Integrated Application	Module	Record Type
<input type="checkbox"/>		<a href="#">1195828</a>	132507728769009644 Document.pdf	09/08/2023 02:58:35 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1195829</a>	132507728740439908 Document.pdf	09/08/2023 03:49:17 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1196190</a>	132507728740439908 Document.pdf	09/14/2023 05:05:54 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1196191</a>	132507728769009644 Document.pdf	09/14/2023 05:05:55 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1196192</a>	132507728689918446 Document.pdf	09/14/2023 05:05:56 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1196194</a>	132507728689918446 Document.pdf	09/14/2023 07:59:24 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent

2) When you click on the "Save Search" option, a dialog box will pop-up where you need to enter a name and description for the saved query.

3) You will notice the "Shared with all users" option in this dialog box, which you can enable to share your query with other users.

**Note:** Sharing your query will require you to enter the Master password before saving.

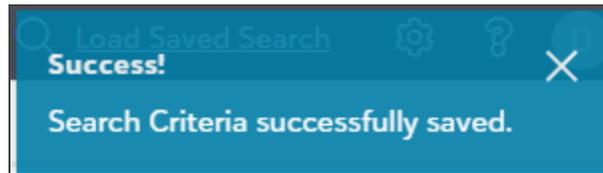
### Save Search Criteria ✕

Name\*:

Description\*:

Shared with all users

4) Once you enter the Master password, your query will be saved and available for all PaperSave users, as shown below.



## Loading saved search queries

1) To run your saved queries, click on “**Load Saved Search**” option present on the application bar, as shown below.

A screenshot of the PaperSave application interface. The top navigation bar includes "PaperSave", "Search", "Documents (Advanced)", and a "Load Saved Search" button. Below the navigation bar, there is a "Change Search Criteria" dropdown menu and a row of action buttons: "REFRESH", "FILTER", "SAVE SEARCH", "CHOOSE FIELDS", and "EXPORT TO EXCEL". The main area displays a table with columns: Content Type, ID, Batch, Created On, Created By, Integrated Database, Integrated Application, Module, and Record Type. The table contains six rows of data, each representing a saved search query for PDF documents.

	ContentType	ID	Batch	CreatedOn	CreatedBy	Integrated Database	Integrated Application	Module	Record Type
<input type="checkbox"/>		<a href="#">1195828</a>	132507728769009644 Document.pdf	09/08/2023 02:58:35 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1195829</a>	132507728740439908 Document.pdf	09/08/2023 03:49:17 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1196190</a>	132507728740439908 Document.pdf	09/14/2023 05:05:54 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1196191</a>	132507728769009644 Document.pdf	09/14/2023 05:05:55 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1196192</a>	132507728689918446 Document.pdf	09/14/2023 05:05:56 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1196194</a>	132507728689918446 Document.pdf	09/14/2023 07:59:24 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent

2) As you click on “**Load Saved Search**”, a dialog box will appear that will contain the list of saved search queries created by the current user or shared with all the users. Select a Saved search from the list and click on the “**Show**” button to view the current results.

Choose Saved Search✕

Name	Description	Last Modified By	Last Modified On
FE documents saved after April 15 2000	All FE documents saved after April 15, 2000	Vivek Soni	10/23/2020
BBRCM	Constituent	Vrunda Bhalani	09/14/2023

Show Cancel

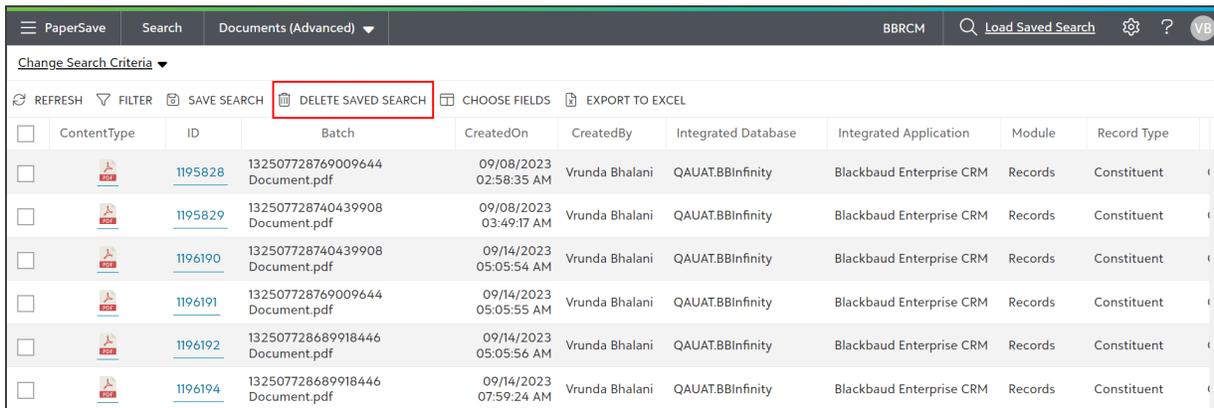
3) As shown in the below screen, you will get the current results of your saved query.

Change Search Criteria									
<input type="checkbox"/>	ContentType	ID	Batch	CreatedOn	CreatedBy	Integrated Database	Integrated Application	Module	Record Type
<input type="checkbox"/>	<a href="#">1195828</a>	132507728769009644	Document.pdf	09/08/2023 02:58:35 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>	<a href="#">1195829</a>	132507728740439908	Document.pdf	09/08/2023 03:49:17 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>	<a href="#">1196190</a>	132507728740439908	Document.pdf	09/14/2023 05:05:54 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>	<a href="#">1196191</a>	132507728769009644	Document.pdf	09/14/2023 05:05:55 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>	<a href="#">1196192</a>	132507728689918446	Document.pdf	09/14/2023 05:05:56 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>	<a href="#">1196194</a>	132507728689918446	Document.pdf	09/14/2023 07:59:24 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent

## Deleting saved search queries

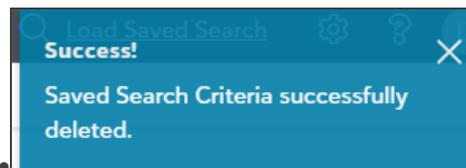
- 1) To remove the unwanted saved search criteria, you can click on the “**Delete Saved Search**” from the list toolbar. This option will be shown in the list toolbar after you have loaded a saved search.
- 2) On clicking “Delete Saved Search” option, the currently loaded saved search query will be deleted from the list.

**Note:** Delete Saved Search option gets enabled only when the loaded Saved Search was created by the current user.



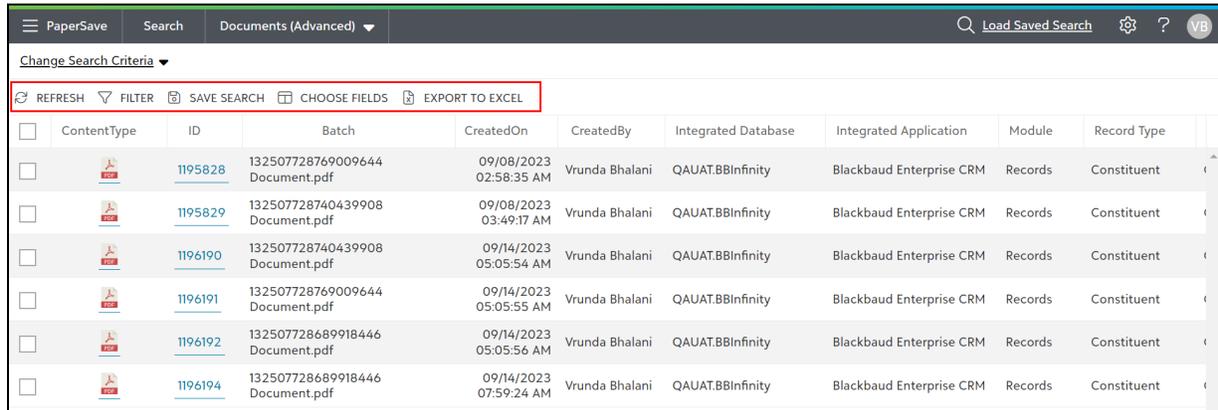
Change Search Criteria									
REFRESH FILTER SAVE SEARCH DELETE SAVED SEARCH CHOOSE FIELDS EXPORT TO EXCEL									
	ContentType	ID	Batch	CreatedOn	CreatedBy	Integrated Database	Integrated Application	Module	Record Type
<input type="checkbox"/>		<a href="#">1195828</a>	132507728769009644 Document.pdf	09/08/2023 02:58:35 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1195829</a>	132507728740439908 Document.pdf	09/08/2023 03:49:17 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1196190</a>	132507728740439908 Document.pdf	09/14/2023 05:05:54 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1196191</a>	132507728769009644 Document.pdf	09/14/2023 05:05:55 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1196192</a>	132507728689918446 Document.pdf	09/14/2023 05:05:56 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
<input type="checkbox"/>		<a href="#">1196194</a>	132507728689918446 Document.pdf	09/14/2023 07:59:24 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent

- 3) You will receive a confirmation message that the saved search was deleted, as shown below.



## Advanced Search list toolbar

The Search Area offers a list toolbar for the Advanced Search, as shown below.



The screenshot shows a software interface for an advanced search. At the top, there are navigation tabs: 'PaperSave', 'Search', and 'Documents (Advanced)'. On the right, there are icons for 'Load Saved Search', a settings gear, a help question mark, and a user profile 'VB'. Below the tabs is a 'Change Search Criteria' dropdown menu. A red box highlights the list toolbar, which contains five icons: a circular arrow for 'REFRESH', a funnel for 'FILTER', a document with a checkmark for 'SAVE SEARCH', a grid for 'CHOOSE FIELDS', and a document with an arrow for 'EXPORT TO EXCEL'. Below the toolbar is a table with the following columns: 'Content Type', 'ID', 'Batch', 'Created On', 'Created By', 'Integrated Database', 'Integrated Application', 'Module', and 'Record Type'. The table contains six rows of data, each representing a document record.

Content Type	ID	Batch	Created On	Created By	Integrated Database	Integrated Application	Module	Record Type
Document.pdf	1195828	132507728769009644	09/08/2023 02:58:35 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
Document.pdf	1195829	132507728740439908	09/08/2023 03:49:17 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
Document.pdf	1196190	132507728740439908	09/14/2023 05:05:54 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
Document.pdf	1196191	132507728769009644	09/14/2023 05:05:55 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
Document.pdf	1196192	132507728689918446	09/14/2023 05:05:56 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent
Document.pdf	1196194	132507728689918446	09/14/2023 07:59:24 AM	Vrunda Bhalani	QAUAT.BBInfinity	Blackbaud Enterprise CRM	Records	Constituent

Following are the options in the list toolbar for Advanced Search:

- **REFRESH**

This option enables you to update the recent changes in the list.

- **FILTER**

You can use the 'Filter' option to view items in the list based on specific column/field values such as Batch Name. Learn more about [Filter](#).

- **SAVE SEARCH**

You can save the search queries to retrieve them later. Learn more about [Save Search](#).

- **CHOOSE FIELDS**

You can set your user preferences to manage what information is displayed in the list by adding or removing columns based on what's important to you using Choose Fields. Learn more about [Choose Fields](#).

- **EXPORT TO EXCEL**

You can export the current list of items to Microsoft Excel Sheet. Learn more about [Export to Excel](#).

## Searching documents for Blackbaud CRM records

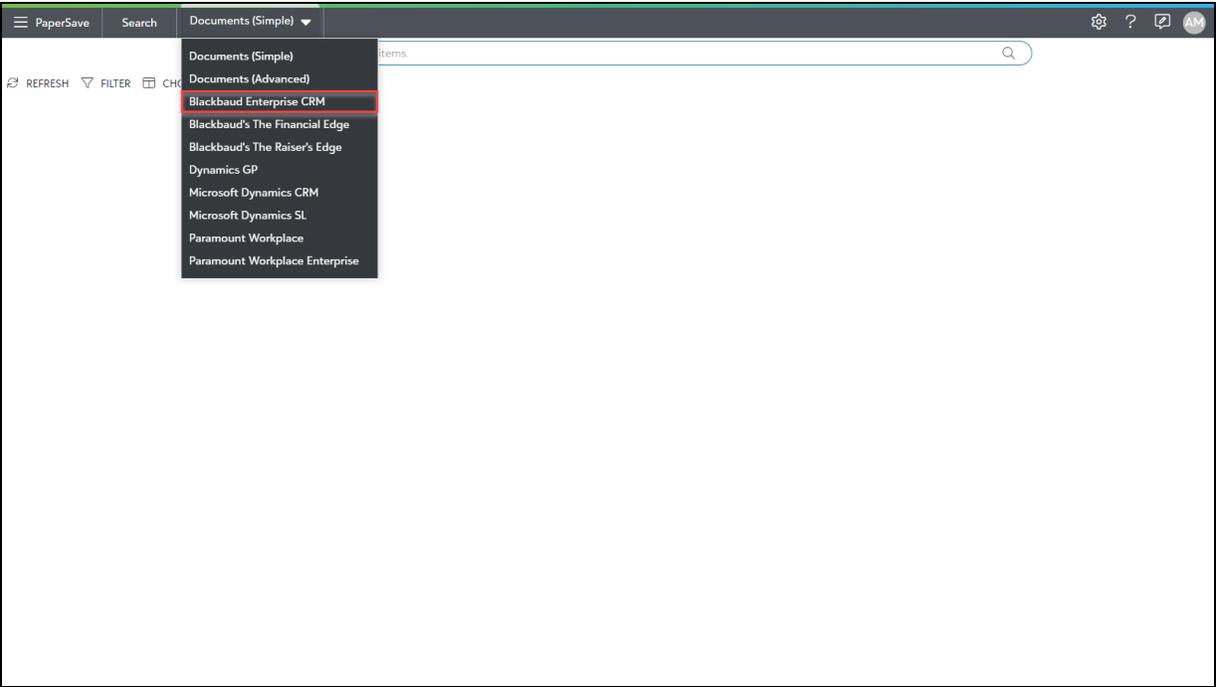
Search Area facilitates you to search for records of an Integrated application i.e. Blackbaud CRM for desired Instance, view the documents associated with one or more records, and add new documents to one or more Integrated App records using available File capture options.

Watch the [video](#) to learn about the Integrated App Record Search.

Following are the steps to get started with Integrated App Record Search:

**1) Choose an Integrated Application**

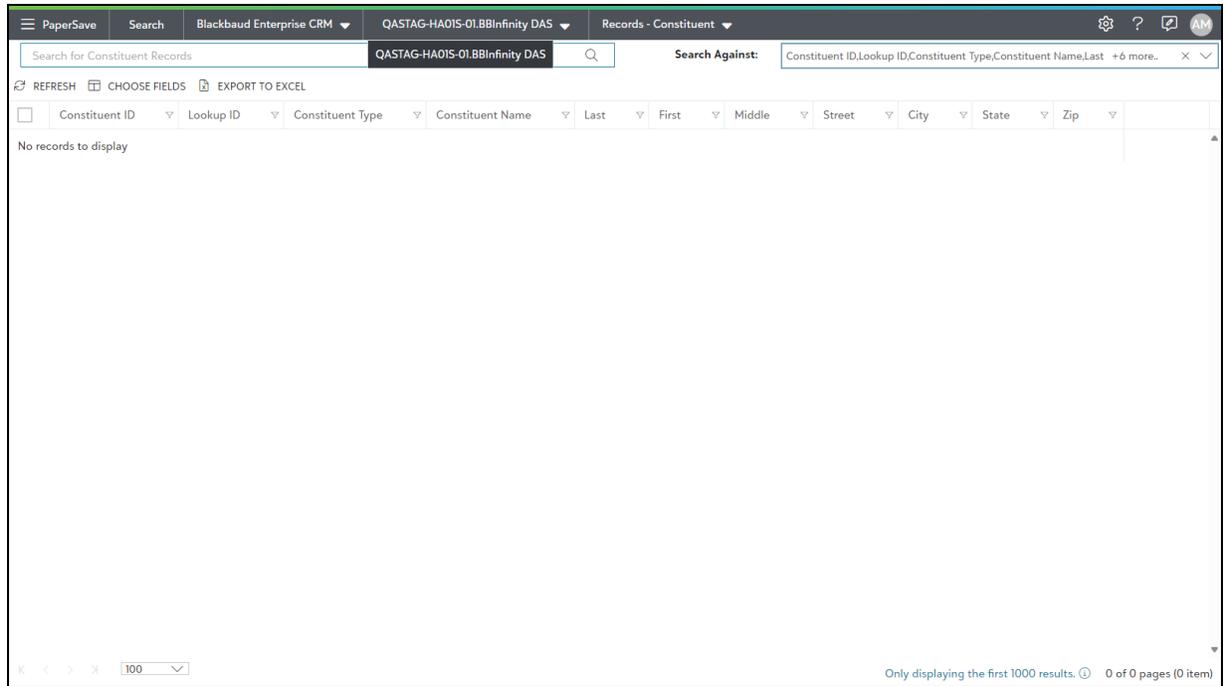
Choose Blackbaud Enterprise CRM from the Search drop-down to accomplish a search against the Integrated app record as shown in the below screen:



## 2) Select an Integrated App instance

You can choose Blackbaud CRM instance from available options in drop-down list as shown in the below screen. The Search results will be displayed for the selected Integrated app instance:

**Note:** You can skip this step in case only one Integrated Application instance is defined.

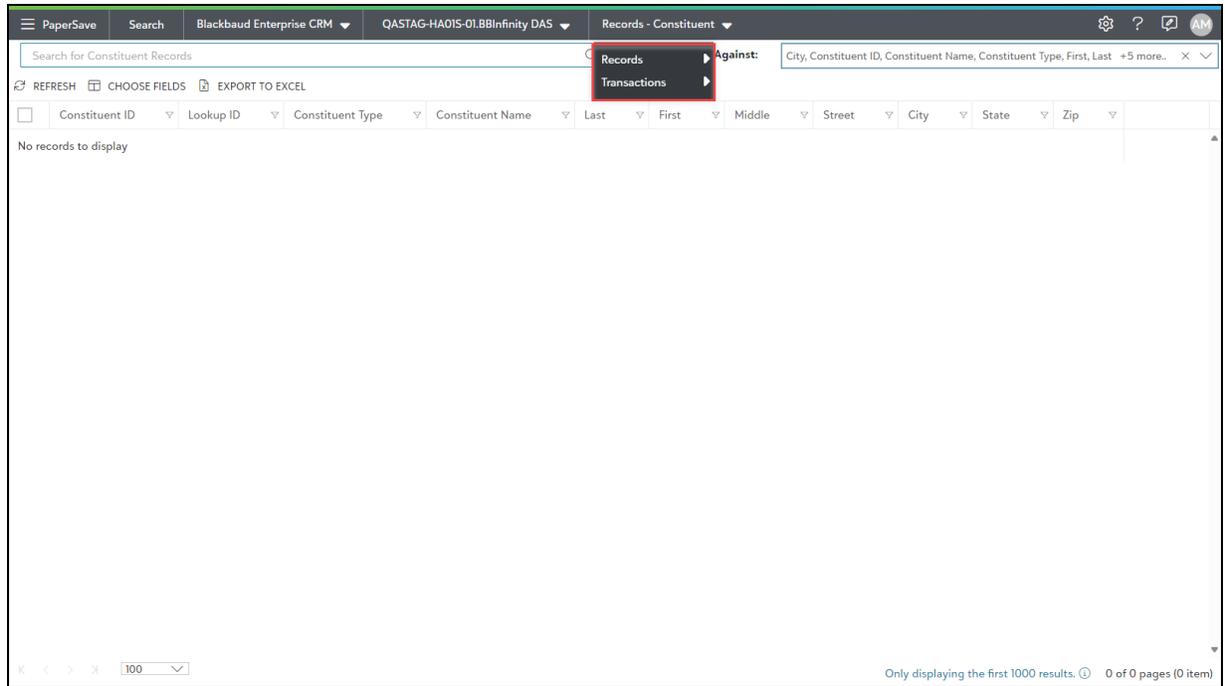


**Note:** Integrated App instance drop-down will be displayed in case of multiple instances. Once you switch to another Integrated application instance, then it will perform the search for the selected Integrated Application instance.

**Note:** The Integrated Application instance(s) will be displayed for which the current user has the rights to view the documents for.

### 3) Select a Record Type

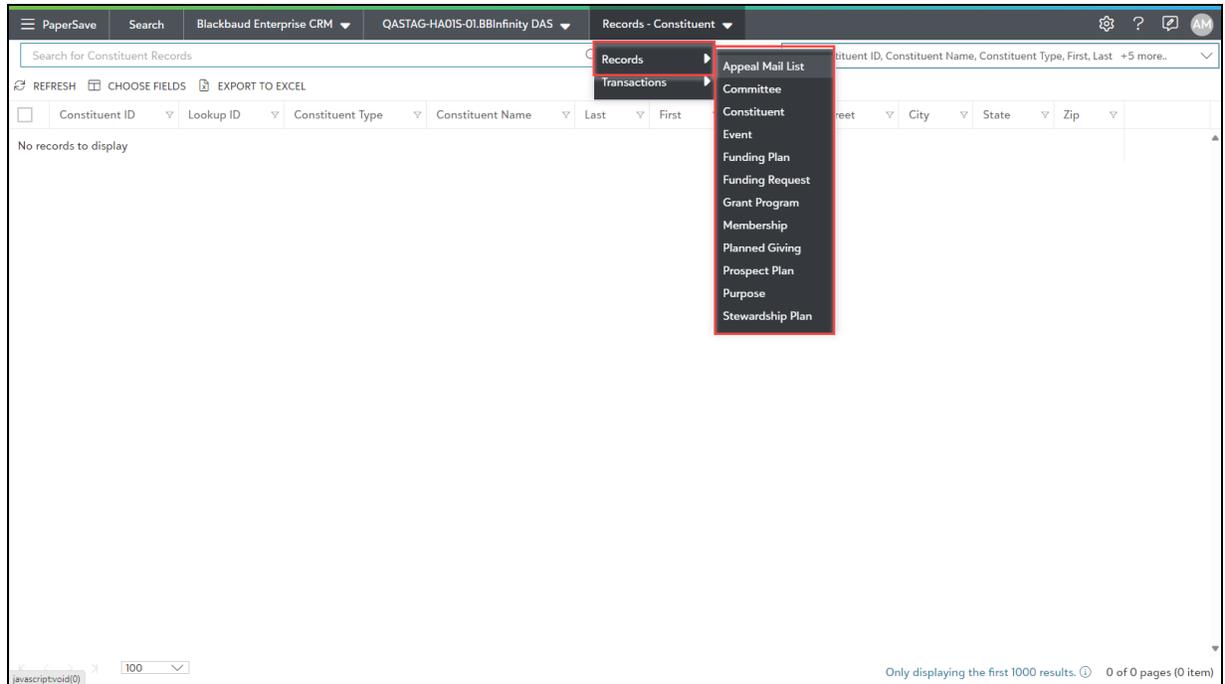
As you select the Blackbaud CRM, it will display the tiles for available record types. Select a desired record type from the given tiles:



The record types will be displayed if the current user has any of the following rights:

- Add or view rights for a particular record type.
- Add or view rights at least for one of the document type under a particular record type as well as the add or view rights for that particular record type.

**Note:** Integrated App record Search displays the **tile view** for the Modules and Record Types within the modules for the first time only. You can select the Record type from the drop down list on subsequent logins as shown in the below screen.



- Once you are done selecting the Integrated Application, Integrated Application Instance, and Record Type, then you are ready for searching the desired Integrated app records using search keywords.

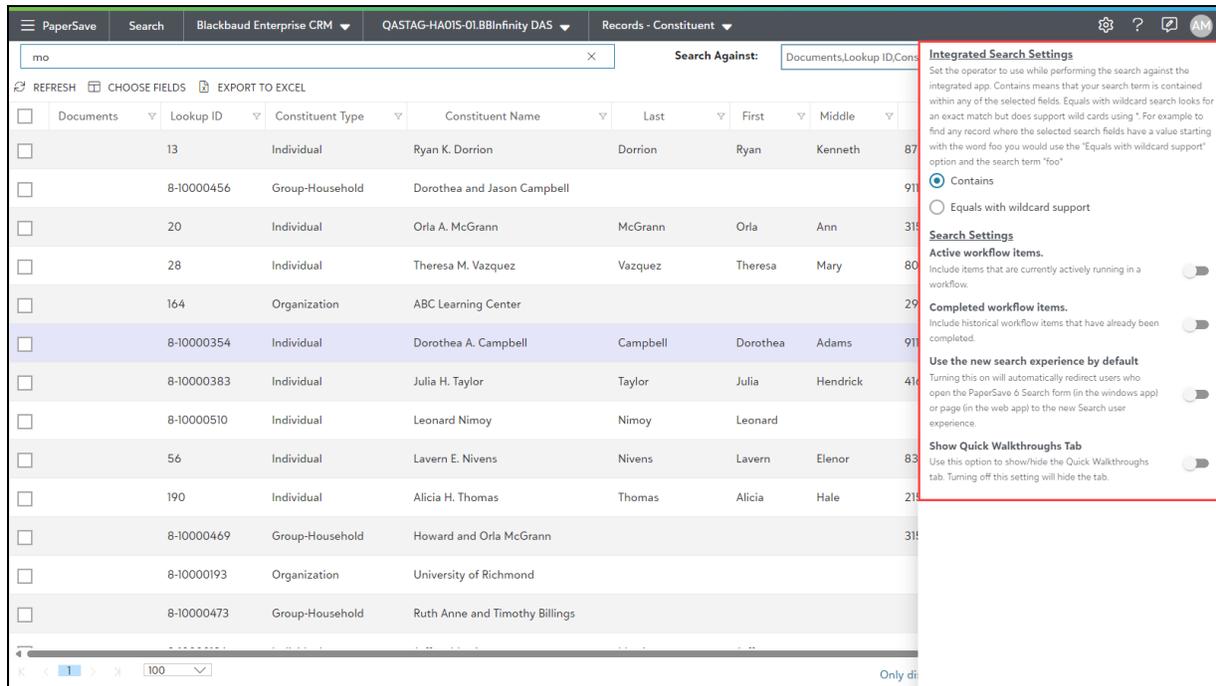
The following topics are covered in this section:

- [Integrated App Search settings](#)
- [Performing Integrated App Search Criteria](#)
- [Integrated App Search List toolbar](#)
- [Integrated App Search Slide Up toolbar](#)
- [Adding a new document to Integrated App record](#)
- [View Related documents of an Integrated App record](#)
- [View Interrelated documents of an Integrated App record](#)

## Integrated App Search settings

You can define your preferences related to Integrated Application Search in the Settings menu from within the

Gear icon  as shown below:



The screenshot displays the PaperSave Search interface. The search bar contains the text "mo". The search results table has the following columns: Documents, Lookup ID, Constituent Type, Constituent Name, Last, First, Middle, and a numeric column. The search results are as follows:

Documents	Lookup ID	Constituent Type	Constituent Name	Last	First	Middle	
<input type="checkbox"/>	13	Individual	Ryan K. Dorrior	Dorrior	Ryan	Kenneth	87
<input type="checkbox"/>	8-10000456	Group-Household	Dorothea and Jason Campbell				91
<input type="checkbox"/>	20	Individual	Orla A. McGrann	McGrann	Orla	Ann	31
<input type="checkbox"/>	28	Individual	Theresa M. Vazquez	Vazquez	Theresa	Mary	80
<input type="checkbox"/>	164	Organization	ABC Learning Center				29
<input type="checkbox"/>	8-10000354	Individual	Dorothea A. Campbell	Campbell	Dorothea	Adams	91
<input type="checkbox"/>	8-10000383	Individual	Julia H. Taylor	Taylor	Julia	Hendrick	41
<input type="checkbox"/>	8-10000510	Individual	Leonard Nimoy	Nimoy	Leonard		
<input type="checkbox"/>	56	Individual	Lavern E. Nivens	Nivens	Lavern	Elenor	83
<input type="checkbox"/>	190	Individual	Alicia H. Thomas	Thomas	Alicia	Hale	21
<input type="checkbox"/>	8-10000469	Group-Household	Howard and Orla McGrann				31
<input type="checkbox"/>	8-10000193	Organization	University of Richmond				
<input type="checkbox"/>	8-10000473	Group-Household	Ruth Anne and Timothy Billings				

The "Integrated Search Settings" panel is open on the right side of the screen. It contains the following options:

- Integrated Search Settings**
  - Set the operator to use while performing the search against the integrated app. Contains means that your search term is contained within any of the selected fields. Equals with wildcard search looks for an exact match but does support wild cards using ". For example to find any record where the selected search fields have a value starting with the word foo you would use the "Equals with wildcard support" option and the search term "foo"
  - Contains
  - Equals with wildcard support
- Search Settings**
  - Active workflow items.** Include items that are currently actively running in a workflow.
  - Completed workflow items.** Include historical workflow items that have already been completed.
  - Use the new search experience by default** Turning this on will automatically redirect users who open the PaperSave 6 Search form (in the windows app) or page (in the web app) to the new Search user experience.
  - Show Quick Walkthroughs Tab** Use this option to show/hide the Quick Walkthroughs tab. Turning off this setting will hide the tab.

## Integrated Search Settings

You can set the operator to use while performing the search against the Integrated application records.

- **Contains** signifies that your search term is contained within any of the selected fields.
- **Equals with Wildcard support** signifies that search looks for an exact match with the support for wild cards using "\*". For e.g. - you can use the "Equals with wildcard support" option and the search term "fab" to find any record where the selected search fields have a value starting with the word "fab".

## Search Settings

The options available in the Search settings section apply to all search types including Simple and Advanced Searches:

### **Active Workflow items**

Includes items that are currently active in a Workflow. This will have such Workflow items that are not yet associated with an integrated application record.

### **Completed Workflow items**

Turn "**ON**" this option to include historical Workflow items that have already been completed.

**Note:** This setting requires the current user being in the Workflow security principle for "**users who can view Workflow items that they do not own.**"

### **Use the new search experience by default**

Turn **ON** this option to automatically redirect users who open the PaperSave 6 Search form (in the windows app) or page (in the web app) to the new Search user experience.

### **Show Quick Walkthroughs Tab**

Use the toggle option to show/hide the Quick walkthroughs tab on the screen.

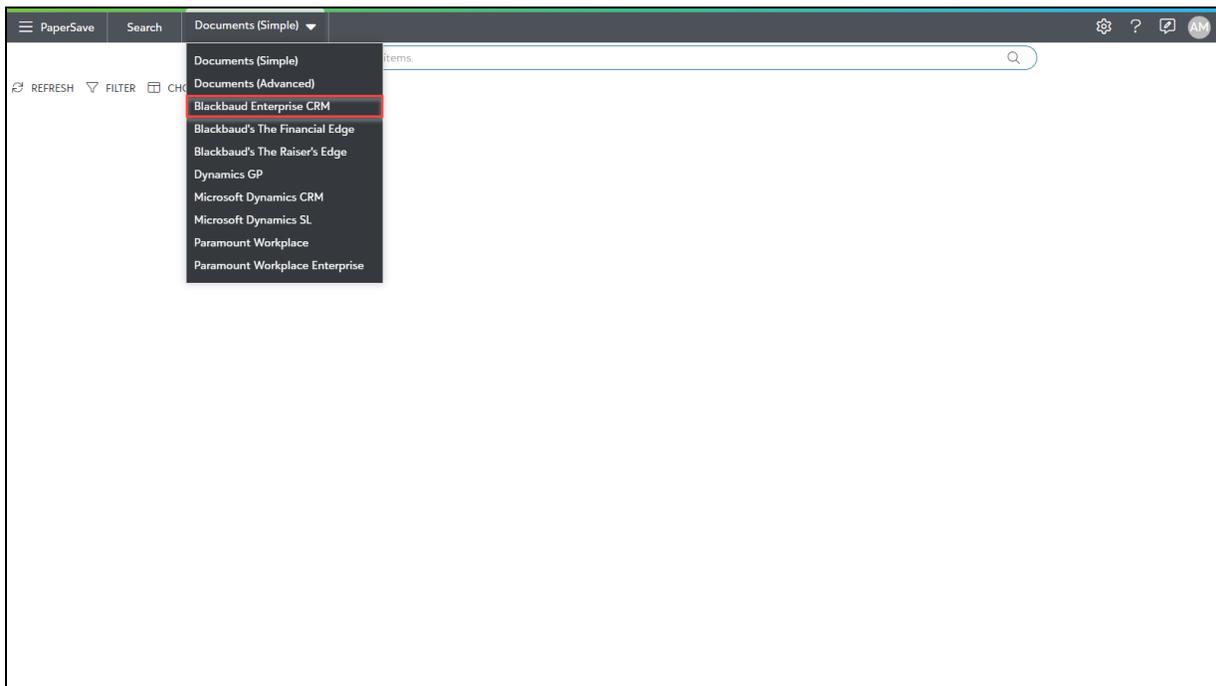
**Note:** The options you select in the Settings Panel will be available for all search types. Hence, any changes made when in any search area will be reflected globally for the current user.

## Integrated App Search Criteria

Follow the below steps to perform Integrated App Record Search:

**Note:** Ensure that you have set your desired preferences in the Settings panel underneath the gear icon.

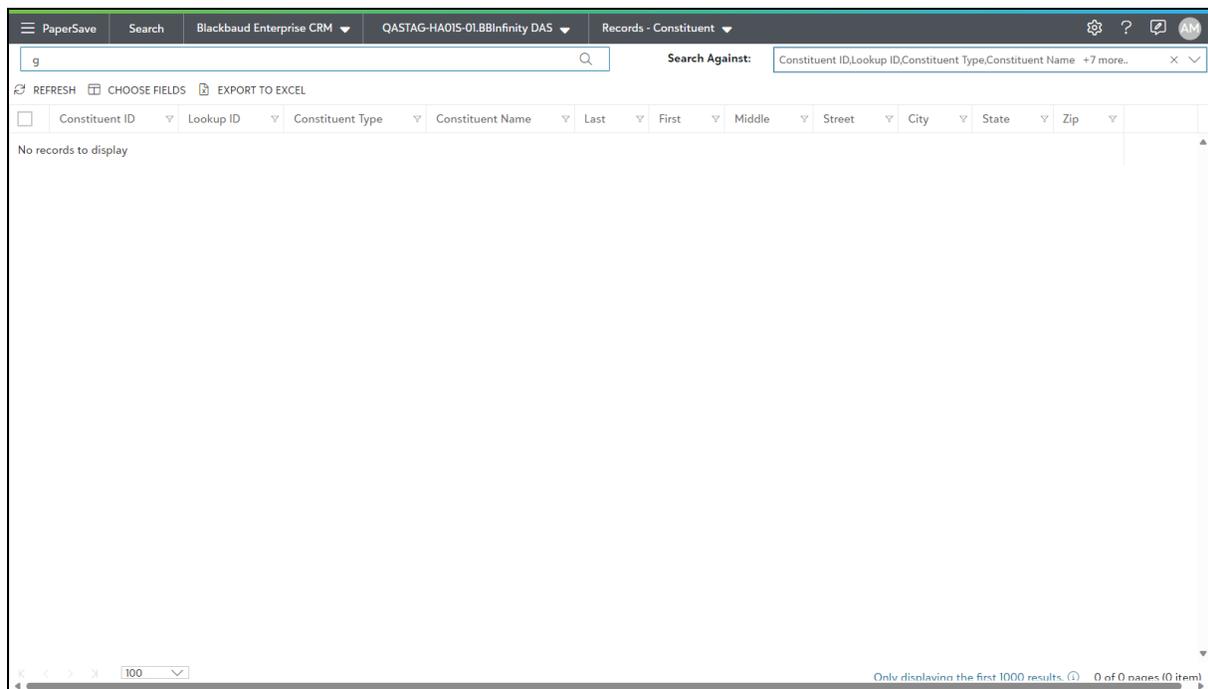
1) Click on the Search drop-down. You will see a list of Integrated Applications (defined in the Configuration Area). Select the desired Blackbaud CRM from the Search drop-down.



2) Select the desired Integrated Application Instance if there are multiple instances.

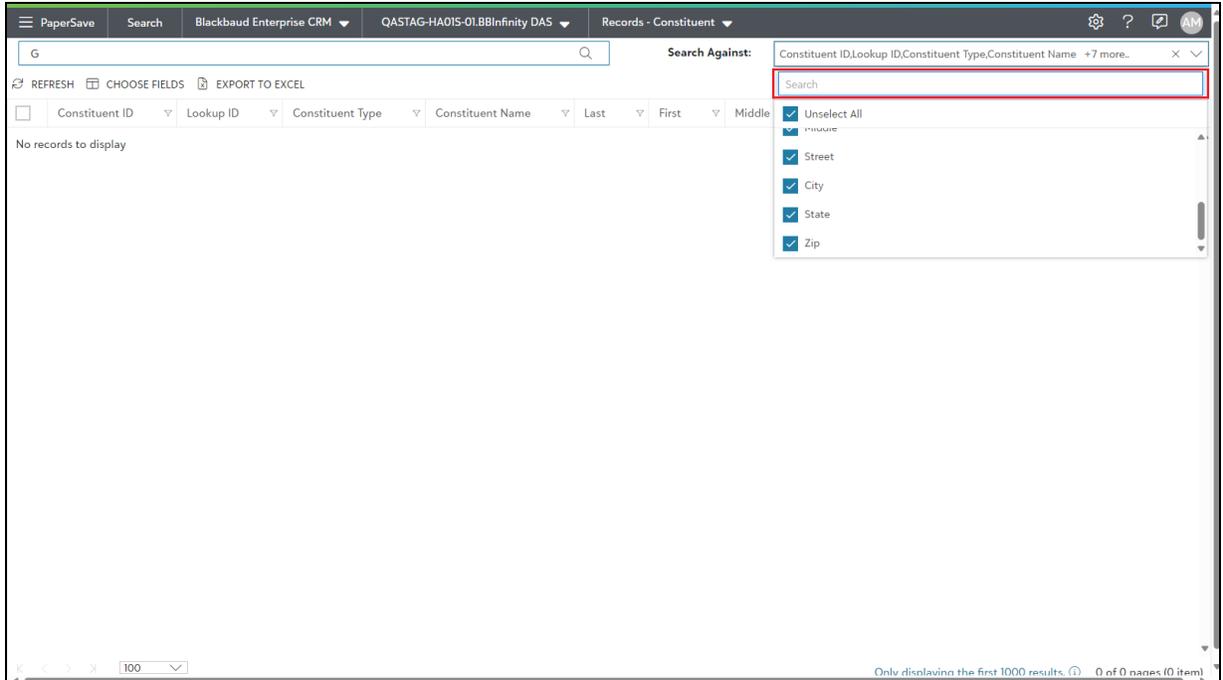
3) You will see a list of supported Record types for the selected Integrated Application in the Application bar drop-down (tile view if you are accessing for the first time). Select the desired Record Type.

4) **Enter** the desired keyword to narrow down the search in the left search box (titled "search for <Record Type> records").



5) **Select** the fields from the "Search Against" drop-down on the right corner of the screen to further narrow down your Search. Also, you can perform the search against all the fields for the selected record type.

**Note:** The "Search Against" drop-down will display all the fields as selected by default. You can deselect the desired fields to increase the specificity of the Search.



- The search result will display a list of matching Integrated App records as shown in the below screen:

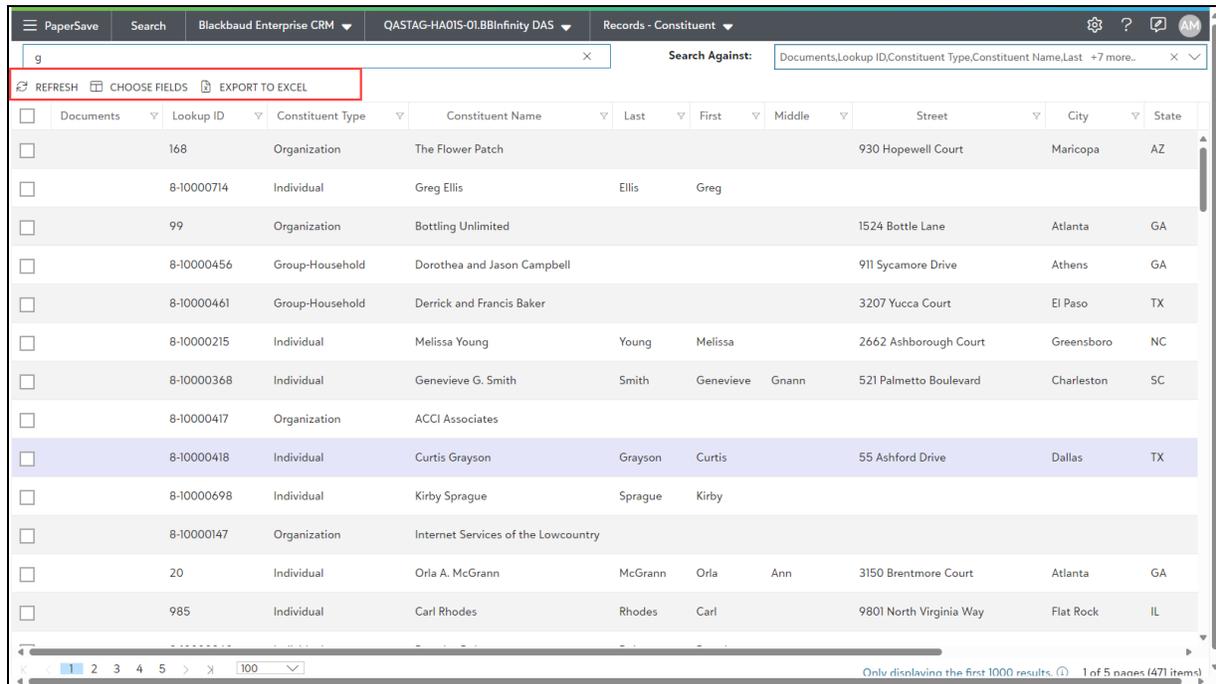
The screenshot shows the same search interface, but now displaying 14 search results for the query 'g'. The table has the following columns: Documents, Lookup ID, Constituent Type, Constituent Name, Last, First, Middle, Street, City, and State. The records are as follows:

Documents	Lookup ID	Constituent Type	Constituent Name	Last	First	Middle	Street	City	State
<input type="checkbox"/>	168	Organization	The Flower Patch				930 Hopewell Court	Maricopa	AZ
<input type="checkbox"/>	8-10000714	Individual	Greg Ellis	Ellis	Greg				
<input type="checkbox"/>	99	Organization	Bottling Unlimited				1524 Bottle Lane	Atlanta	GA
<input type="checkbox"/>	8-10000456	Group-Household	Dorothea and Jason Campbell				911 Sycamore Drive	Athens	GA
<input type="checkbox"/>	8-10000461	Group-Household	Derrick and Francis Baker				3207 Yucca Court	El Paso	TX
<input type="checkbox"/>	8-10000215	Individual	Melissa Young	Young	Melissa		2662 Ashborough Court	Greensboro	NC
<input type="checkbox"/>	8-10000368	Individual	Genevieve G. Smith	Smith	Genevieve	Gnann	521 Palmetto Boulevard	Charleston	SC
<input type="checkbox"/>	8-10000417	Organization	ACCI Associates						
<input type="checkbox"/>	8-10000418	Individual	Curtis Grayson	Grayson	Curtis		55 Ashford Drive	Dallas	TX
<input type="checkbox"/>	8-10000698	Individual	Kirby Sprague	Sprague	Kirby				
<input type="checkbox"/>	8-10000147	Organization	Internet Services of the Lowcountry						
<input type="checkbox"/>	20	Individual	Orla A. McGrann	McGrann	Orla	Ann	3150 Brentmore Court	Atlanta	GA
<input type="checkbox"/>	985	Individual	Carl Rhodes	Rhodes	Carl		9801 North Virginia Way	Flat Rock	IL

The status bar at the bottom indicates 'Only displaying the first 1000 results. 1 of 5 pages (471 items)'.

## Integrated App Search List toolbar

The Integrated App Search offers a list toolbar as shown below:



The screenshot shows a web application interface for searching constituents. At the top, there is a search bar with the letter 'g' and a search criteria dropdown set to 'Documents, Lookup ID, Constituent Type, Constituent Name, Last +7 more...'. Below the search bar is a toolbar with three buttons: 'REFRESH', 'CHOOSE FIELDS', and 'EXPORT TO EXCEL'. The 'REFRESH' button is highlighted with a red box. Below the toolbar is a table with columns for 'Documents', 'Lookup ID', 'Constituent Type', 'Constituent Name', 'Last', 'First', 'Middle', 'Street', 'City', and 'State'. The table contains 15 rows of data, with the row for 'Curtis Grayson' highlighted in blue. At the bottom of the table, there is a pagination bar showing '1' of 5 pages (471 items).

Documents	Lookup ID	Constituent Type	Constituent Name	Last	First	Middle	Street	City	State
<input type="checkbox"/>	168	Organization	The Flower Patch				930 Hopewell Court	Maricopa	AZ
<input type="checkbox"/>	8-10000714	Individual	Greg Ellis	Ellis	Greg				
<input type="checkbox"/>	99	Organization	Bottling Unlimited				1524 Bottle Lane	Atlanta	GA
<input type="checkbox"/>	8-10000456	Group-Household	Dorothea and Jason Campbell				911 Sycamore Drive	Athens	GA
<input type="checkbox"/>	8-10000461	Group-Household	Derrick and Francis Baker				3207 Yucca Court	El Paso	TX
<input type="checkbox"/>	8-10000215	Individual	Melissa Young	Young	Melissa		2662 Ashborough Court	Greensboro	NC
<input type="checkbox"/>	8-10000368	Individual	Genevieve G. Smith	Smith	Genevieve	Gnann	521 Palmetto Boulevard	Charleston	SC
<input type="checkbox"/>	8-10000417	Organization	ACCI Associates						
<input type="checkbox"/>	8-10000418	Individual	Curtis Grayson	Grayson	Curtis		55 Ashford Drive	Dallas	TX
<input type="checkbox"/>	8-10000698	Individual	Kirby Sprague	Sprague	Kirby				
<input type="checkbox"/>	8-10000147	Organization	Internet Services of the Lowcountry						
<input type="checkbox"/>	20	Individual	Orla A. McGrann	McGrann	Orla	Ann	3150 Brentmore Court	Atlanta	GA
<input type="checkbox"/>	985	Individual	Carl Rhodes	Rhodes	Carl		9801 North Virginia Way	Flat Rock	IL

The following are the options in the Integrated App Search list toolbar:

- **REFRESH**

This option can be used to update the recent changes in the current list.

- **CHOOSE FIELDS**

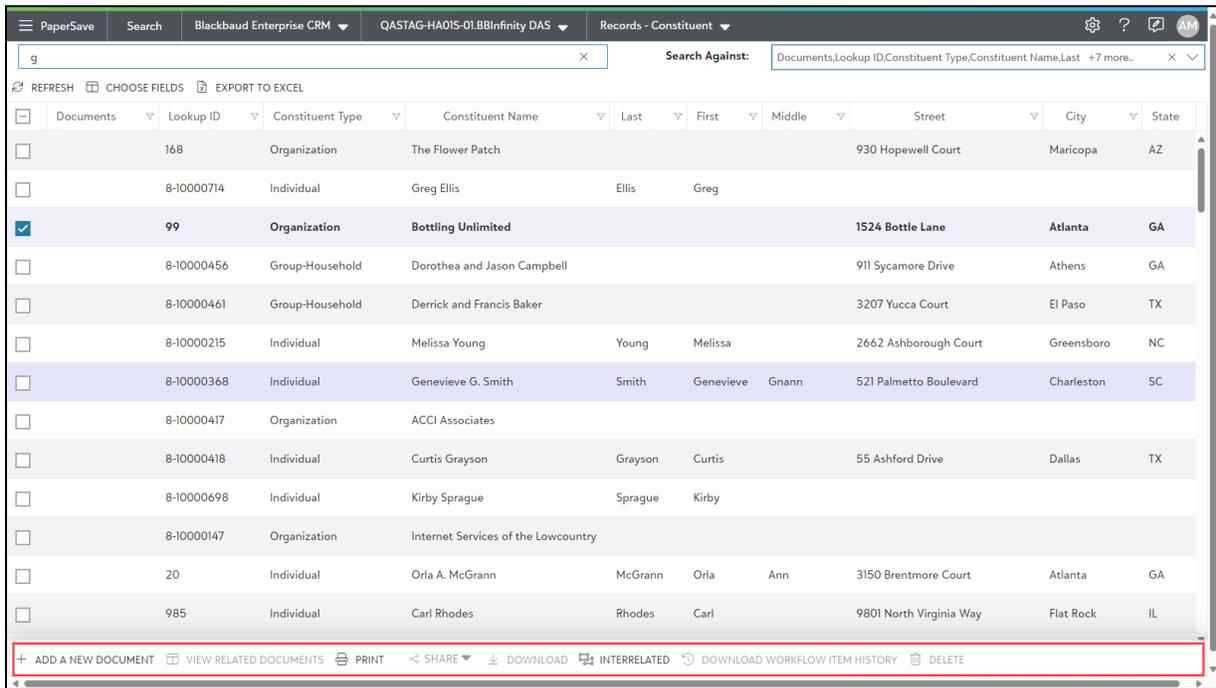
You can set desired preferences for the fields to be displayed in the current list using Choose Fields. Learn more about [Choose Fields](#).

- **EXPORT TO EXCEL**

You can export the current list of items to Microsoft Excel. Learn more about [Export to Excel](#).

## Integrated App Search Slide Up toolbar

The Integrated App Record Search offers a Slide up toolbar as shown below:



The following are the options in the Integrated App Search Slide up toolbar:

The slide up toolbar offers various operations that can be performed on single or multiple records in the list.

- **ADD A NEW DOCUMENT**

This option enables you to add a new document to the selected record(s). Click on [this](#) option to be redirected to the 'File Capture' options panel.

- **VIEW RELATED DOCUMENTS**

You can view the list of documents that are associated with the selected record. When there is only one document related to the selected record, it will be displayed in the item viewer. Click [here](#) to know more in detail.

- **PRINT**

Currently, this option is not available for the users.

- **SHARE**

You can share the selected item(s) by sending the file in eMail , sending the link of the file in the eMail or copy the link of the file to clipboard.

- **DOWNLOAD**

Currently, this option is not available for the users.

- **INTERRELATED**

This option allows you to view documents that are indirectly related/associated to the selected record or document type based on the interrelationships that have been defined in the PaperSave Configuration Area. Click [here](#) to know more in detail.

- **DOWNLOAD WORKFLOW ITEM HISTORY**

When a document has gone through a PaperSave Workflow, this option will allow you to download the history for the selected item as it moved from one step to another. This option will be disabled if the document has not traversed through a workflow.

- **DELETE**

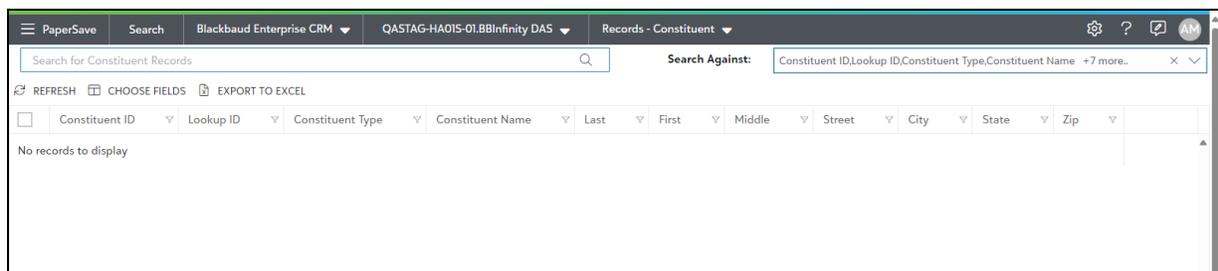
Currently, this option is not available for the users.

## Adding a new document to Blackbaud CRM record

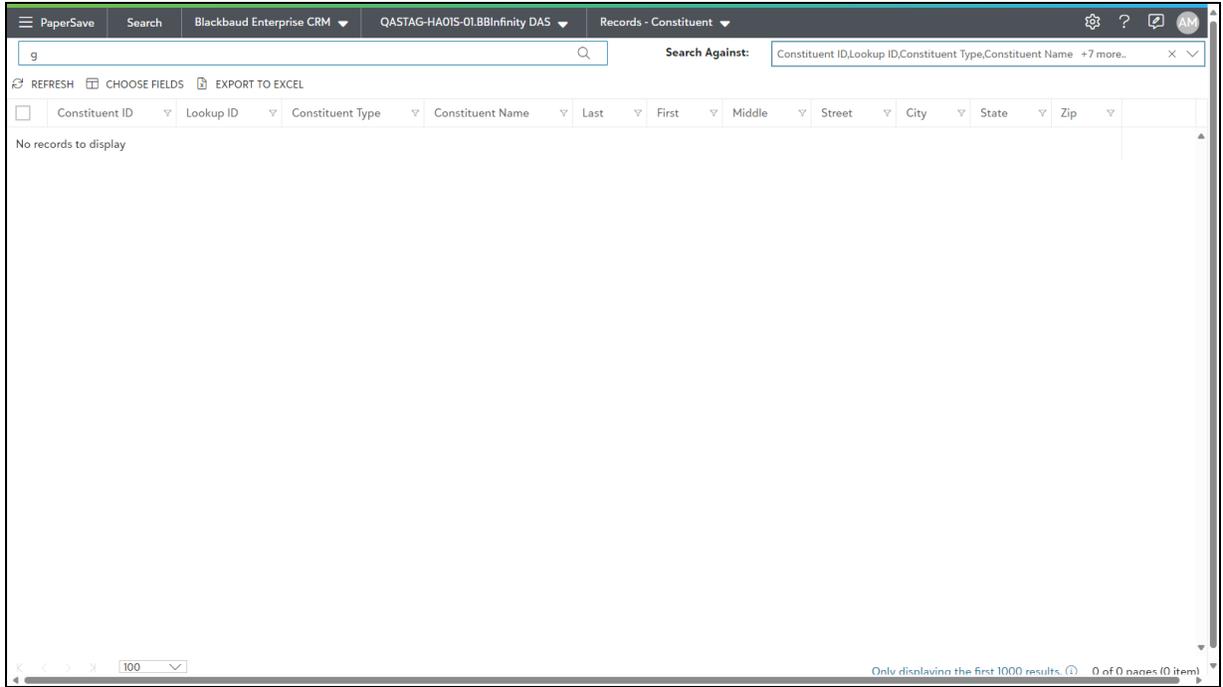
Search Area enables you to add new documents to an Blackbaud CRM record using various file capture options such as Scan using TWAIN compliant scanner or Fujitsu fi-NX series scanner, Drag files or select files from your file explorer, and click to generate a barcode to scan the documents in a batch at a later time.

Follow the below steps to add a new document in an Integrated App record from the Search Area:

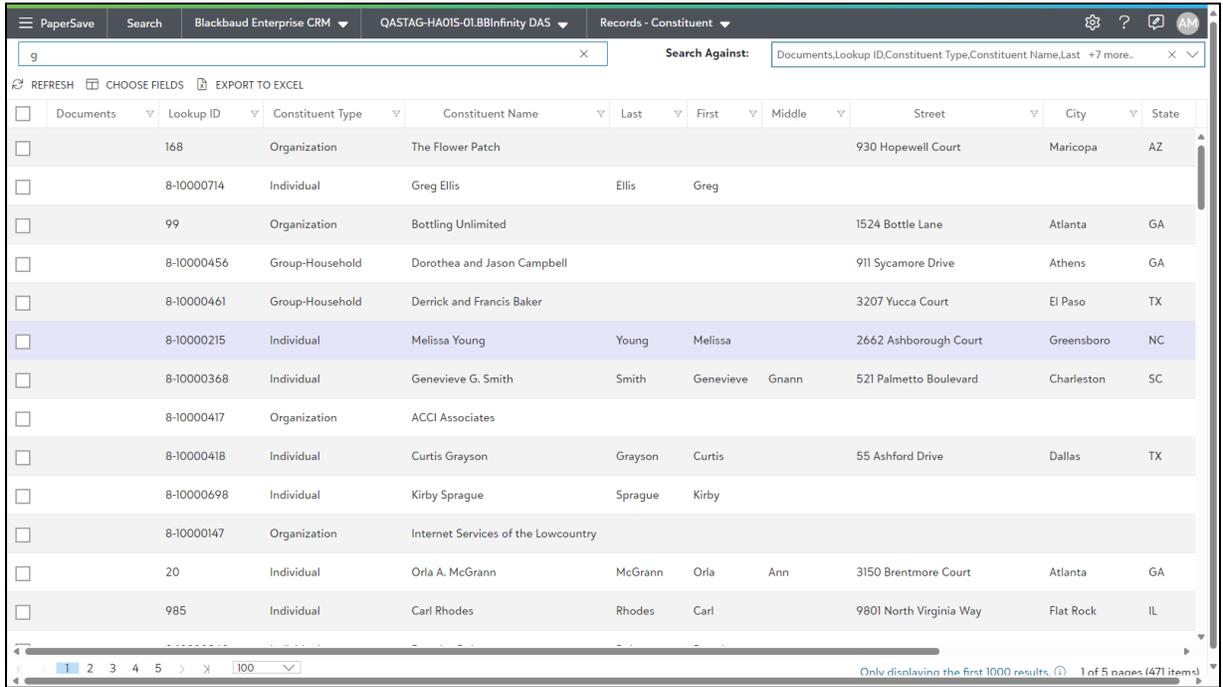
1) Select the Blackbaud CRM from the Search drop-down. Also, you can Select your desired Integrated application instance (in case of multiple instances only). Now, select the desired Record type from the drop down as shown in the below screen.



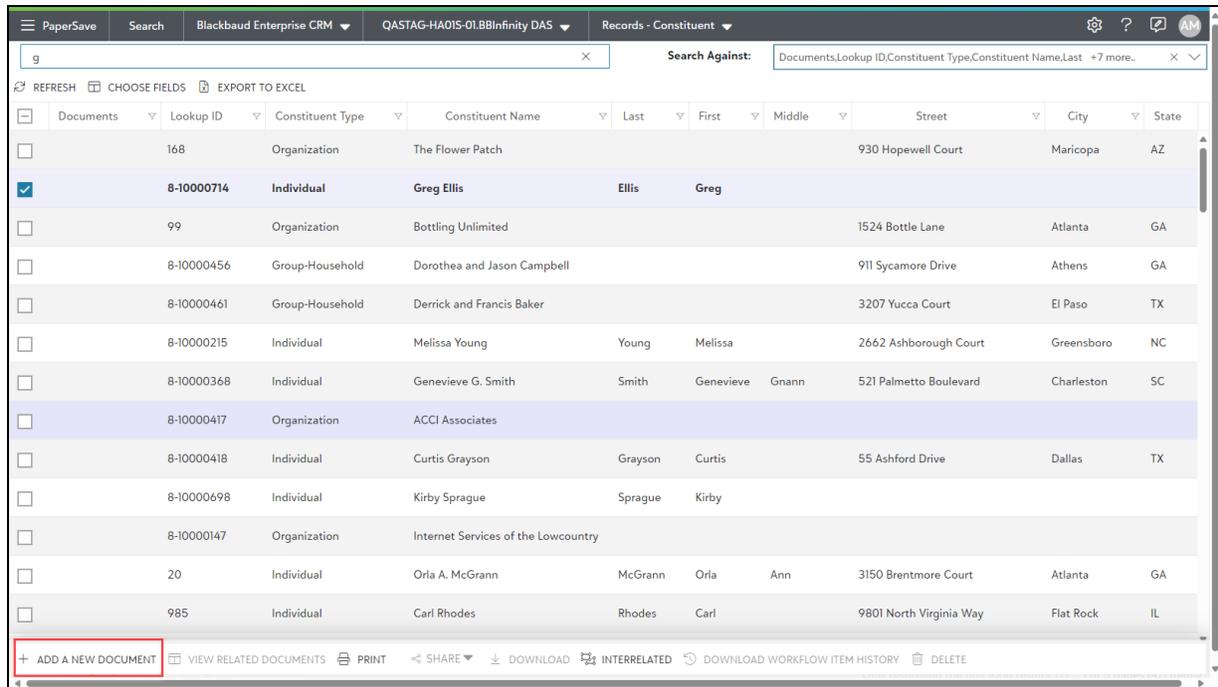
2) **Enter** the keywords to **search** documents for the desired record type in an integrated application. Then, press Enter or click on the search icon  to load all the matching records for the selected record type.



3) You will see a list of matching records based on the entered search keyword.



4) **Select** one or more **records** for which you wish to add new documents. A record list slide up panel will pop-up in the bottom of screen. Click on "**ADD A NEW DOCUMENT**" option in the slide up panel as shown below.



You will see the below topics to add the new documents in the following sections:

- [File Capture options to add new document to integrated app](#)
- [Setting a Batch and default field values](#) for the documents.
- [Validating documents](#) in a document viewer.
- [Saving documents](#) to an integrated app record.

## File capture options panel in Search Area

You can select any of the following file capture options to acquire the documents for an integrated app record in the PaperSave Search Area:

- [ScanNow™ using TWAIN compliant scanner](#)
- [ScanNow™ using Fujitsu fi-NX series scanner](#)
- [Drag items or select the files to upload](#)
- [Click to generate a barcode to scan the document in a batch at a later time](#)

### **File capture options top level toolbar**

The following [video](#) covers the file capture options top level toolbar in the Search Area:

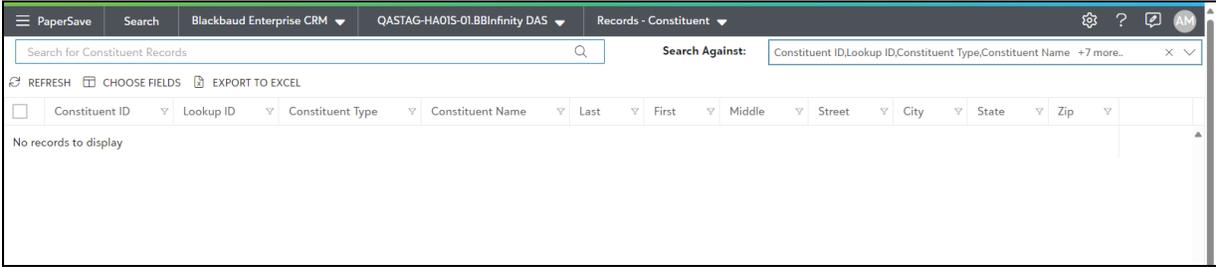
## **File Capture options Settings**

The following [video](#) explains the File Capture Settings panel in the Search Area:

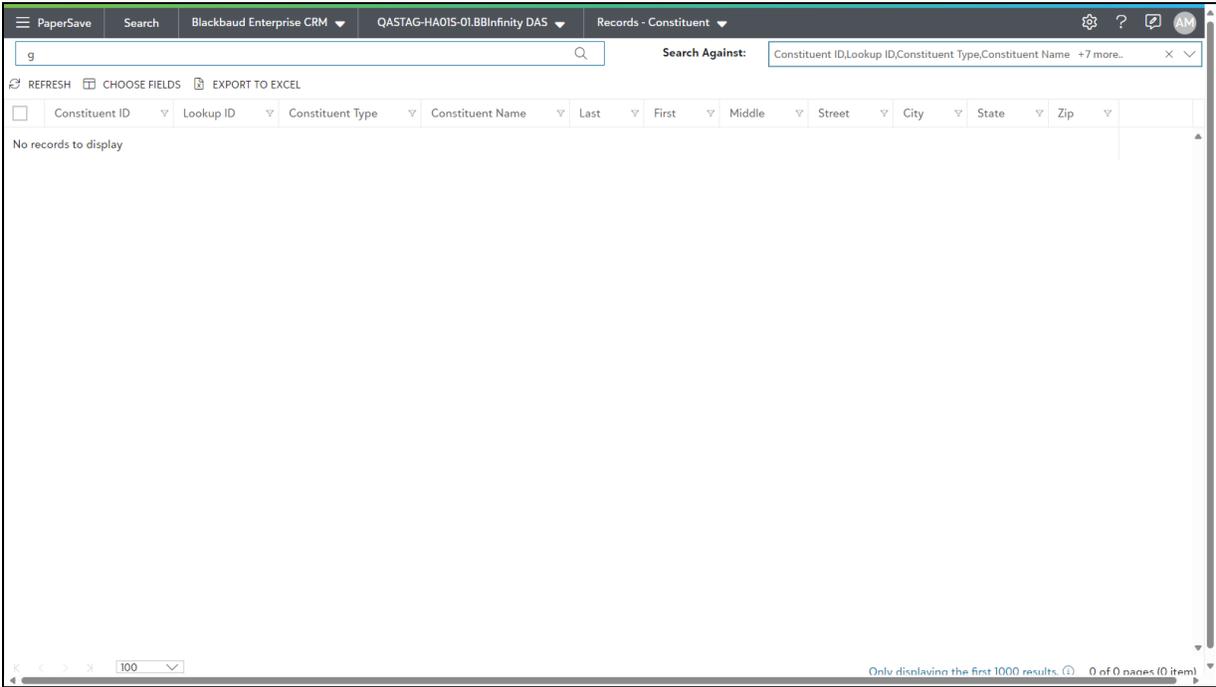
## **View Related documents of Blackbaud CRM record**

You can view the documents that are associated to any particular record in an integrated application that PaperSave is integrated into. Follow the below steps to view the related documents to an Blackbaud CRM record:

1) Select Blackbaud CRM from the Search drop-down. Also, you can Select your desired integrated application instance (in case of multiple instances only). Now, select the desired Record type from the drop down as shown in the below screen.



2) **Enter** the keywords to **search** documents for the desired record type in an integrated application. Then, press Enter or click on the search icon  to view all the matching records for the selected record type.



3) You will see a list of matching records based on the entered search keyword.

Documents	Lookup ID	Constituent Type	Constituent Name			Street	City	State
<input type="checkbox"/>	168	Organization	The Flower Patch			930 Hopewell Court	Maricopa	AZ
<input type="checkbox"/>	8-10000714	Individual	Greg Ellis	Ellis	Greg			
<input type="checkbox"/>	99	Organization	Bottling Unlimited			1524 Bottle Lane	Atlanta	GA
<input type="checkbox"/>	8-10000456	Group-Household	Dorothea and Jason Campbell			911 Sycamore Drive	Athens	GA
<input type="checkbox"/>	8-10000461	Group-Household	Derrick and Francis Baker			3207 Yucca Court	El Paso	TX
<input type="checkbox"/>	8-10000215	Individual	Melissa Young	Young	Melissa	2662 Ashborough Court	Greensboro	NC
<input type="checkbox"/>	8-10000368	Individual	Genevieve G. Smith	Smith	Genevieve Gnann	521 Palmetto Boulevard	Charleston	SC
<input type="checkbox"/>	8-10000417	Organization	ACCI Associates					
<input type="checkbox"/>	8-10000418	Individual	Curtis Grayson	Grayson	Curtis	55 Ashford Drive	Dallas	TX
<input type="checkbox"/>	8-10000698	Individual	Kirby Sprague	Sprague	Kirby			
<input type="checkbox"/>	8-10000147	Organization	Internet Services of the Lowcountry					
<input type="checkbox"/>	20	Individual	Orla A. McGrann	McGrann	Orla Ann	3150 Brentmore Court	Atlanta	GA
<input type="checkbox"/>	985	Individual	Carl Rhodes	Rhodes	Carl	9801 North Virginia Way	Flat Rock	IL

4) **Select** one or more **records** for which you wish to see the related documents. A record list slide up panel will pop-up in the bottom of screen. Click on "**VIEW RELATED DOCUMENTS**" option in the slide up panel as shown below.

PaperSave Search Blackbaud Enterprise CRM QASTAG-HA01S-01.BBInfinity DAS Records - Funding Plan

pl Search Against: Documents,Plan Name,Funding Needed,Date Needed +6 more..

REFRESH CHOOSE FIELDS EXPORT TO EXCEL

Documents	Plan Name	Funding Needed	Date Needed	Funding Plan Manager	Department	Program	Site	Description
<input type="checkbox"/>	VB Fundingplan1	50.56	02/07/2024	Elizabeth Radcliffe	Department Test	Program Test		VB Fundingplan1
<input checked="" type="checkbox"/>	12 Funding Plan Test	10	01/23/2024	Wendy Abrahms	Department Test	Program Test		Funding Plan Description
<input type="checkbox"/>	SP_Funding_Plan_Test_1_1@#\$%*&().+*	100	02/07/2024	Wendy Abrahms	Department Test	Program Test		SP Funding Plan Update
<input type="checkbox"/>	SP_Funding_Plan_2	200	02/07/2024	Wendy Abrahms	Department Test	Program Test		FP

+ ADD A NEW DOCUMENT **VIEW RELATED DOCUMENTS** PRINT SHARE DOWNLOAD INTERRELATED DOWNLOAD WORKFLOW ITEM HISTORY DELETE

- Now, you can see the list of related documents for the selected records as shown in the below screen. Click on the document to open it in the Item Viewer.

Funding Plan Documentation

Search within document list

Related Funding Plan	Plan Name	Funding Needed	Date Needed	Funding Plan Manager	Department	Program	Site	Description
	Funding Plan Test	10.0000	01/23/2024	Wendy Abrahms	Department Test	Program Test		Funding Plan Description

Refresh

+ NEW FILTER REFRESH CHOOSE FIELDS SHOW GROUPING EXPORT TO EXCEL INTERRELATED

Content Type	File Size	Created	Created By	Comments
		02/07/2024 06:27:46 PM	PaperSave System	
		02/29/2024 05:53:43 PM	PaperSave System	
		03/06/2024 07:56:23 PM	PaperSave System	
		03/07/2024 03:59:27 PM	PaperSave System	
		03/08/2024 12:11:26 PM	PaperSave System	
		03/08/2024 12:19:17 PM	PaperSave System	
		03/08/2024 12:23:00 PM	PaperSave System	
		03/08/2024 12:33:55 PM	PaperSave System	
		03/08/2024 06:28:58 PM	PaperSave System	
		03/08/2024 07:11:25 PM	PaperSave System	
		03/11/2024 03:19:04 PM	PaperSave System	
		03/11/2024 03:20:16 PM	PaperSave System	

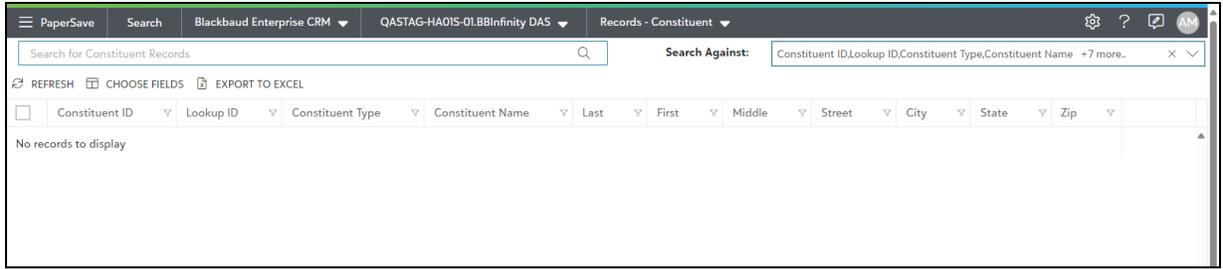
1 of 1 pages (12 items)

**Tip:** You can view the related documents for a **record** in the chosen integrated application context by double clicking on that particular record. The Record must have documents attached to it.

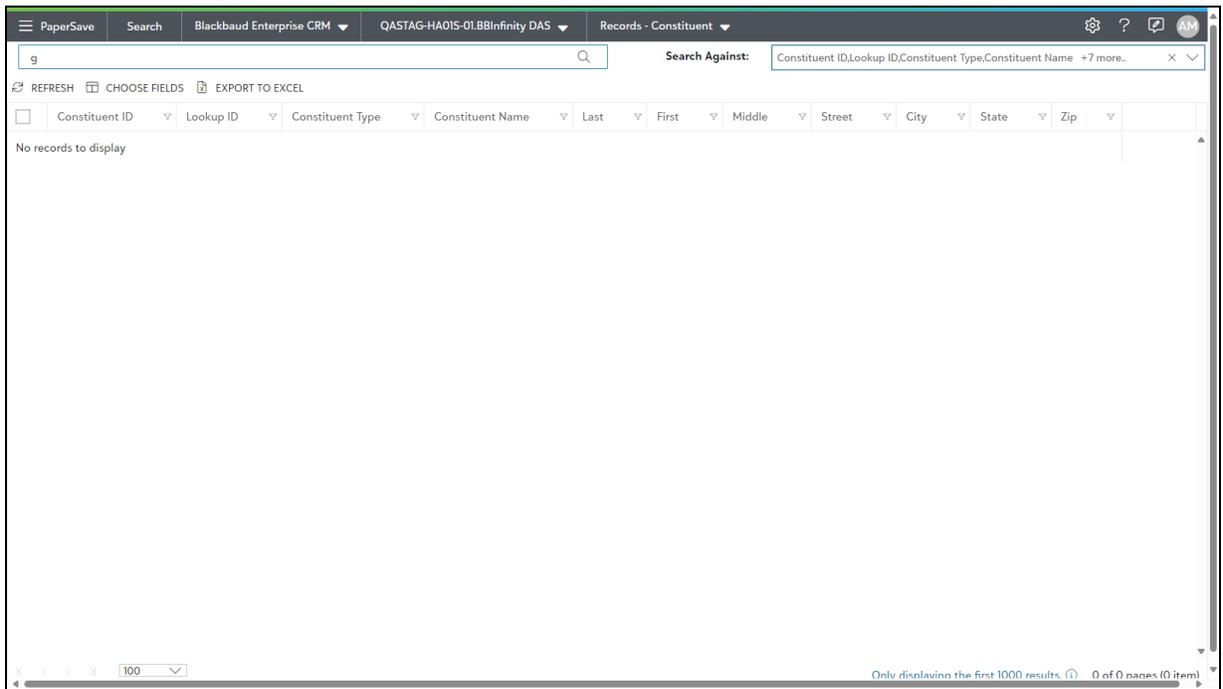
## View Interrelated documents for Blackbaud CRM record

You can view the associated documents that are indirectly related to any record in an integrated application that PaperSave is integrated into. Follow the below steps to view the interrelated documents for an Blackbaud CRM record:

- 1) Select the Blackbaud CRM from the Search drop-down. Also, you can Select your desired Integrated application instance (in case of multiple instances only). Now, select the desired Record type from the drop down as shown in the below screen.



2) **Enter** the keywords to **search** documents for the desired record type in an Blackbaud CRM. Then, press Enter or click on the search icon  to load all the matching records for the selected record type.



3) You will see a list of matching records based on the entered search keyword.

PaperSave Search Blackbaud Enterprise CRM QASTAG-HA01S-01.BBInfinity DAS Records - Constituent

Search Against: Documents,Lookup ID,Constituent Type,Constituent Name,Last +7 more..

REFRESH CHOOSE FIELDS EXPORT TO EXCEL

<input type="checkbox"/>	Documents	Lookup ID	Constituent Type	Constituent Name	Last	First	Middle	Street	City	State
<input type="checkbox"/>		168	Organization	The Flower Patch				930 Hopewell Court	Maricopa	AZ
<input type="checkbox"/>		8-10000714	Individual	Greg Ellis	Ellis	Greg				
<input type="checkbox"/>		99	Organization	Bottling Unlimited				1524 Bottle Lane	Atlanta	GA
<input type="checkbox"/>		8-10000456	Group-Household	Dorothea and Jason Campbell				911 Sycamore Drive	Athens	GA
<input type="checkbox"/>		8-10000461	Group-Household	Derrick and Francis Baker				3207 Yucca Court	El Paso	TX
<input type="checkbox"/>		8-10000215	Individual	Melissa Young	Young	Melissa		2662 Ashborough Court	Greensboro	NC
<input type="checkbox"/>		8-10000368	Individual	Genevieve G. Smith	Smith	Genevieve	Gnann	521 Palmetto Boulevard	Charleston	SC
<input type="checkbox"/>		8-10000417	Organization	ACCI Associates						
<input type="checkbox"/>		8-10000418	Individual	Curtis Grayson	Grayson	Curtis		55 Ashford Drive	Dallas	TX
<input type="checkbox"/>		8-10000698	Individual	Kirby Sprague	Sprague	Kirby				
<input type="checkbox"/>		8-10000147	Organization	Internet Services of the Lowcountry						
<input type="checkbox"/>		20	Individual	Orla A. McGrann	McGrann	Orla	Ann	3150 Brentmore Court	Atlanta	GA
<input type="checkbox"/>		985	Individual	Carl Rhodes	Rhodes	Carl		9801 North Virginia Way	Flat Rock	IL

Only displaying the first 1000 results. 1 of 5 pages (471 items)

4) **Select** one or more **records** for which you wish to see the related documents. A record list slide up panel will pop-up in the bottom of screen. Click on "**INTERRELATED**" option in the slide up panel as shown below.

PaperSave Search Blackbaud Enterprise CRM QASTAG-HA015-01.BBInfinity DAS Records - Funding Plan

pl Search Against: Documents,Plan Name,Funding Needed,Date Needed +6 more.

REFRESH CHOOSE FIELDS EXPORT TO EXCEL

Documents	Plan Name	Funding Needed	Date Needed	Funding Plan Manager	Department	Program	Site	Description
<input type="checkbox"/>	VB Fundingplan1	50.56	02/07/2024	Elizabeth Radcliffe	Department Test	Program Test		VB Fundingplan1
<input checked="" type="checkbox"/>	12 Funding Plan Test	10	01/23/2024	Wendy Abrahms	Department Test	Program Test		Funding Plan Description
<input type="checkbox"/>	SP_Funding_Plan_Test_1_1@#5%*&(!,+)	100	02/07/2024	Wendy Abrahms	Department Test	Program Test		SP Funding Plan Update
<input type="checkbox"/>	SP_Funding_Plan_2	200	02/07/2024	Wendy Abrahms	Department Test	Program Test		FP

+ ADD A NEW DOCUMENT VIEW RELATED DOCUMENTS PRINT SHARE DOWNLOAD INTERRELATED DOWNLOAD WORKFLOW ITEM HISTORY DELETE

- Now, you can see the list of Interrelated documents (that opens in a new tab) for the selected record(s) as shown in the below screen. Click on the document to open it in the Item Viewer.

PaperSave Documents that are interrelated to this root Revenue Search within document list

Root Revenue < Constituent ID 164 Constituent Name ABC Learning Center Transaction Type Payment Transaction Amount \$2500.0000 Payment Method Check Transaction Date 01/14/2006 Transaction Description (Payment) 2500.00 Check - ABC Learning Center Refresh

REFRESH FILTER SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ContentType	File Name	File Size	Created	Created By	Record Type	Document Type	Company Name	HostApplic
<input type="checkbox"/>	GUARDH_33919 (1).pdf	0.03 MB	10/30/2023 04:31:12 PM	staging/prshethqaforms	Constituent	Constituent Documentation	QASTAG-HA015-01.BBInfinity	Blackbaud E
<input type="checkbox"/>	Interview.pdf	0.07 MB	01/08/2024 01:03:21 PM	Sahil Patel	Constituent	Constituent Documentation	QASTAG-HA015-01.BBInfinity	Blackbaud E
<input type="checkbox"/>	Constituent - ID - - VB_Constituent Documentation04-08-2024 01.04 PM.pdf		01/08/2024 01:04:38 PM	Sahil Patel	Constituent	VB_Constituent Documentation	QASTAG-HA015-01.BBInfinity	Blackbaud E
<input type="checkbox"/>	Interview.pdf	0.07 MB	01/10/2024 11:44:53 AM	Sahil Patel	Constituent	Constituent Documentation	QASTAG-HA015-01.BBInfinity	Blackbaud E
<input type="checkbox"/>	Interview.pdf	0.07 MB	02/08/2024 05:16:54 PM	Sahil Patel	Constituent	Constituent Documentation	QASTAG-HA015-01.BBInfinity	Blackbaud E
<input type="checkbox"/>	Constituent - ID - - VB_Constituent Documentation20-08-2024 05.20 PM.pdf		02/08/2024 05:20:09 PM	Sahil Patel	Constituent	VB_Constituent Documentation	QASTAG-HA015-01.BBInfinity	Blackbaud E
<input type="checkbox"/>	Interview.pdf	0.07 MB	04/10/2024 06:51:45 AM	Sahil Patel	Constituent	Constituent Documentation	QASTAG-HA015-01.BBInfinity	Blackbaud E
<input type="checkbox"/>	PO2377.pdf	0.06 MB	04/22/2024 02:07:49 PM	Ashwini Amrutkar	Constituent	Constituent Documentation	QASTAG-HA015-01.BBInfinity	Blackbaud E
<input type="checkbox"/>	PO2259.pdf	0.07 MB	04/22/2024 02:10:10 PM	Ashwini Amrutkar	Constituent	Constituent Documentation	QASTAG-HA015-01.BBInfinity	Blackbaud E



# Configuration Area

This section is designed to get the audience up and running with PaperSave Configuration Area. You can learn about the key features and functionalities of PaperSave Configuration Area. This section can be used as an ongoing reference while using the software.

Watch the [video](#) to know how to get started with the basics of the Configuration Area.

The following topics are available in Configuration Area:

- [Most Frequently Used Settings](#)
- [General Settings](#)
- [Workflow & Automation](#)

- [Application Integration](#)
- [Utilities and Downloads](#)

## Most Frequently Used Settings

The Configuration Area displays the various settings in the “Most Frequently Used Settings” section based on how often you access a setting tile. Thus, it helps you quickly navigate to the Configuration Area settings that are most common in use.

**Note:** The “Most Frequently Used Settings” section displays 8 tiles in total having the highest usage count. The Setting tiles will vary for each user based on their usage count.

The Configuration Area maintains a usage count of each setting every time a user accesses a particular setting tile. The tiles in this Section will be displayed based on the usage count of each setting and if one or more settings have the same usage count, then the setting with higher alphabetical order will be displayed.

Watch the [video](#) to know about the Most Frequently Used Settings.

A user accessing the Configuration Area for the first time will be displayed below settings in the “Most Frequently Used Settings” section by default. The usage count of these default settings will be pre-defined to a specific count for a new user.

- Miscellaneous Settings
- Workflows
- Import/Export Configurations
- Integrated App Instances
- Reports
- Restart PaperSave Services

- Users and Group Management
- Workflow Notifications

Let us understand how the settings tiles are displayed in the "Most Frequently Used Settings" section at a given point in time using the following scenarios:

SETTING TITLE	SETTING USAGE COUNT
Setting A	12
Setting B	18
Setting C	11
Setting D	17
Setting E	25
Setting F	29
Setting M	9
Setting N	14

### Scenario 1

Now, if a new Setting titled Setting Z reaches the usage count of 10, then Setting Z will be displayed, and Setting M tile will disappear in the "Most Frequently Used Settings" section as it exceeds the usage count of Setting M.

### Scenario 2

If a Setting titled Setting H reaches the usage count of 9, then Setting H will be displayed and Setting M tile will disappear in the "Most Frequently Used Settings" section as the usage count may be same for both, but the alphabetical order priority of Setting M is lower than Setting H.

### Scenario 3

If a Setting R reaches the usage count of 9, then the "Most Frequently Used Settings" section will remain unchanged as the usage count may be same for both (R & M), but the alphabetical order priority of Setting M is higher than Setting R.

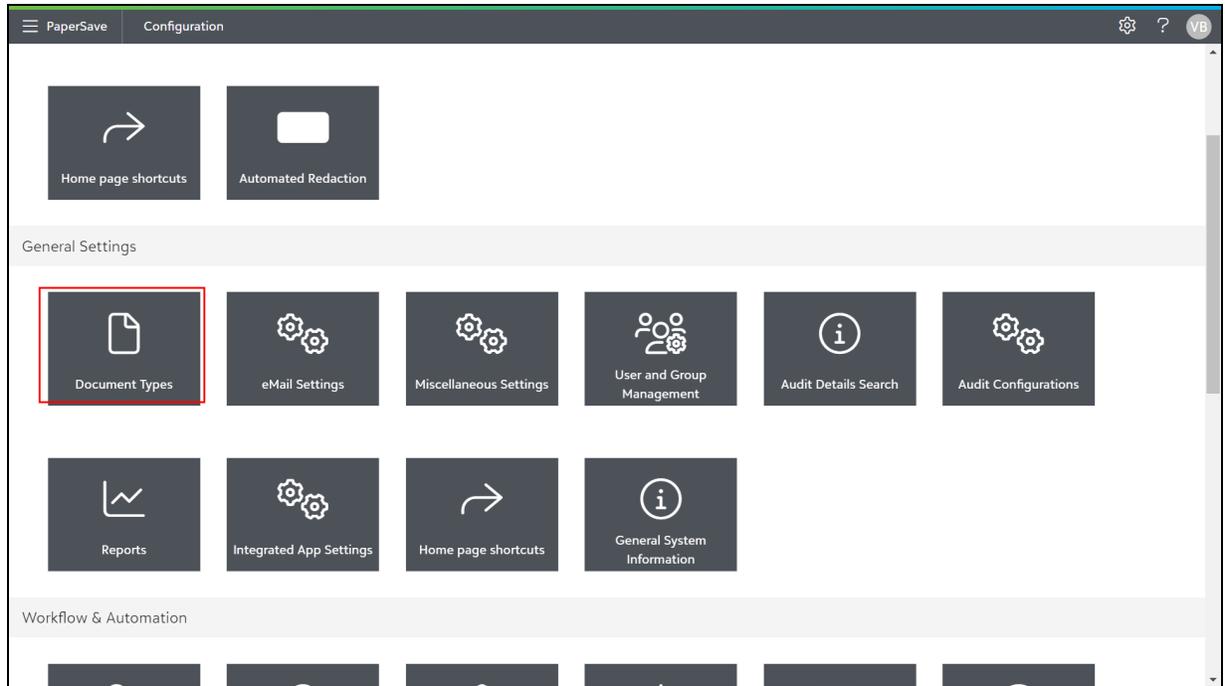
## General Settings

The following topics are covered in General Settings:

- [Document Types](#)
- [eMail Settings](#)
- [Miscellaneous settings](#)
- [Licensing and Active Users](#)
- [User and Group Management](#)
- [Audit Details Search](#)
- [Audit Configuration](#)
- [Integrated App Settings](#)
- [Home page shortcuts](#)
- [General System Information](#)

## Document Types

Document types section allows you to manage your Integrated Application Document Types or PaperSave Document Types. You can navigate to this section from General Settings in the Configuration Area as shown in the below screen.



The following are the topics covered in Document Types section:

- [Adding Integrated Application Document Types](#)
- [Managing Integrated Application Document Types](#)
- [Adding PaperSave Document Types](#)
- [Managing PaperSave Document Types](#)
- [Working with Document Type fields](#)
- [Set Document Type field order](#)

## Adding Integrated Application Document Types

Watch the [video](#) to know how to add an Integrated Application Document Type.

## **Managing Integrated Application Document Types**

Watch the [video](#) to know how to manage Integrated Application Document Type.

## **Adding PaperSave Document Types**

Watch the [video](#) to know how to add PaperSave Document Type.

## Managing PaperSave Document Types

Watch the [video](#) to know how to manage PaperSave Document Type.

## **Working with Document Type fields**

Watch the [video](#) to know how to manage Document Type fields.

## **Set Document Type field order**

Watch the [video](#) to know how to manage ranking for Document Type fields.

## eMail Settings

PaperSave allows you to define preferences related to Workflow email notifications (that are sent to Workflow step owner to review the assigned Workflow items) or email alerts about any unexpected errors in PaperSave (For Example, "Auto Entry Execution error", "Workflow Execution error", etc.) from the **eMail Settings**.

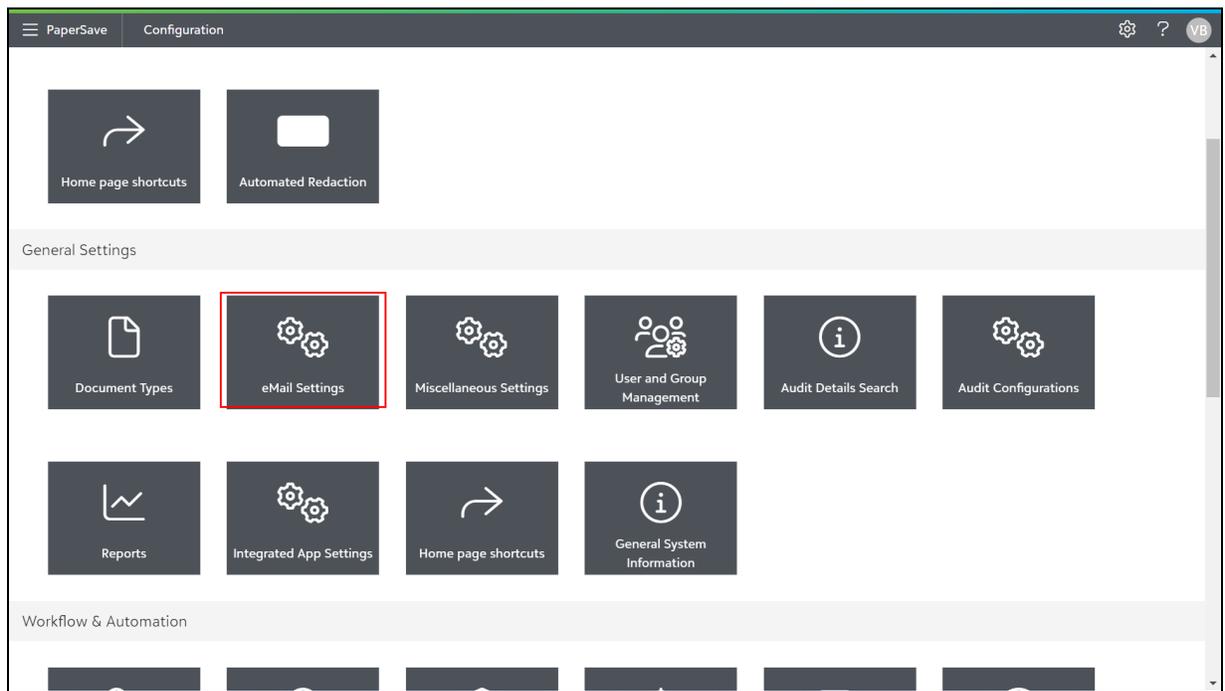
**eMail Settings** option enables you to perform the following operations:

- Enable/Disable Diagnostic email alerts.
- Define email addresses to receive diagnostic email alerts.

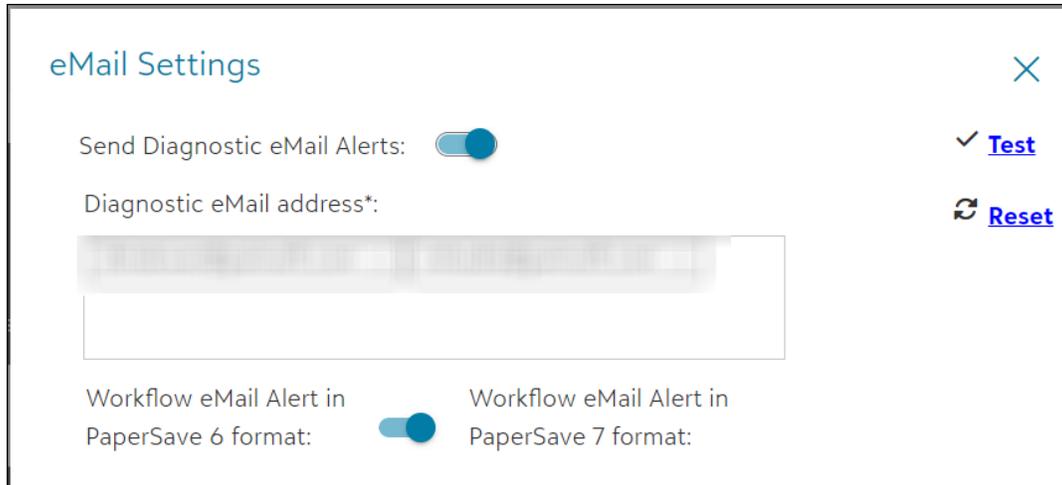
- Send an email alert to the specified email addresses (using the Test option).
- Choose the Notification style for email alerts (that is PaperSave 6x or 7x format).

Follow the below steps to configure PaperSave eMail Settings:

1) Click on **eMail Settings** in General Settings section of the Configuration Area.

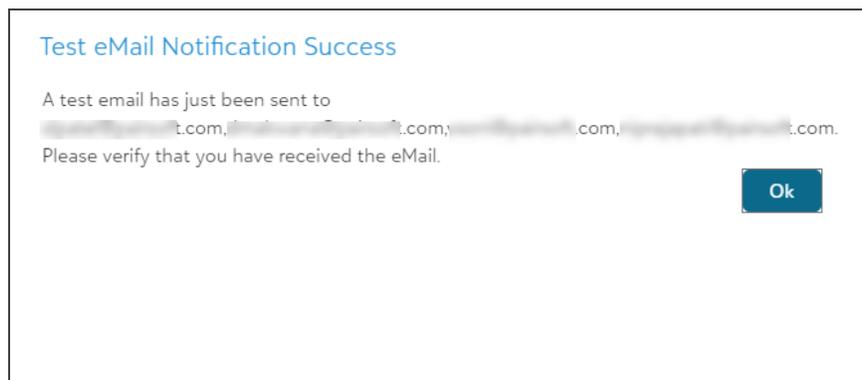


2) Now, eMail Settings dialog box pops up as shown in the below screen.



3) The following are various options in the eMail Settings:

- **Send Diagnostic eMail Alerts:** Turn **on** this option to enable the diagnostic email settings options.
- **Diagnostic eMail address:** Enter the email addresses of the user in the given box and press **Enter** from the keyboard to insert the email address. Similarly, you can add multiple email addresses in the search box.
- **Test:** Click on **Test** to send the diagnostic alert notifications to the specified email addresses. You will see the following prompt once the eMail alerts are sent.



- **Reset:** Click on the **Reset** option to restore the last saved diagnostic email addresses. This option can be used to discard the recently added email addresses before exiting the dialog.
- **Workflow eMail alert in PaperSave 6 or 7 format:** Choose the desired format to receive all the email notifications.

**Note:** Click [here](#) to learn more about PaperSave email notifications style.

## PaperSave eMail notification style

The following are various eMail notifications style in PaperSave 6x format and PaperSave 7x format.

- [PaperSave 7 style eMail notification - Per Item](#)
- [PaperSave 7 style email notification - In Group](#)
- [PaperSave 6 style email notifications - Per Item](#)
- [PaperSave 6 style email notifications - In Group](#)

**Tip:** Email notification style (PaperSave 6 or 7 format) can be defined from within the eMail Settings in the Configuration Area as shown in the below screen. Use the toggle button to choose the desired format.

## eMail Settings ✕

Send Diagnostic eMail Alerts:

Diagnostic eMail address\*:

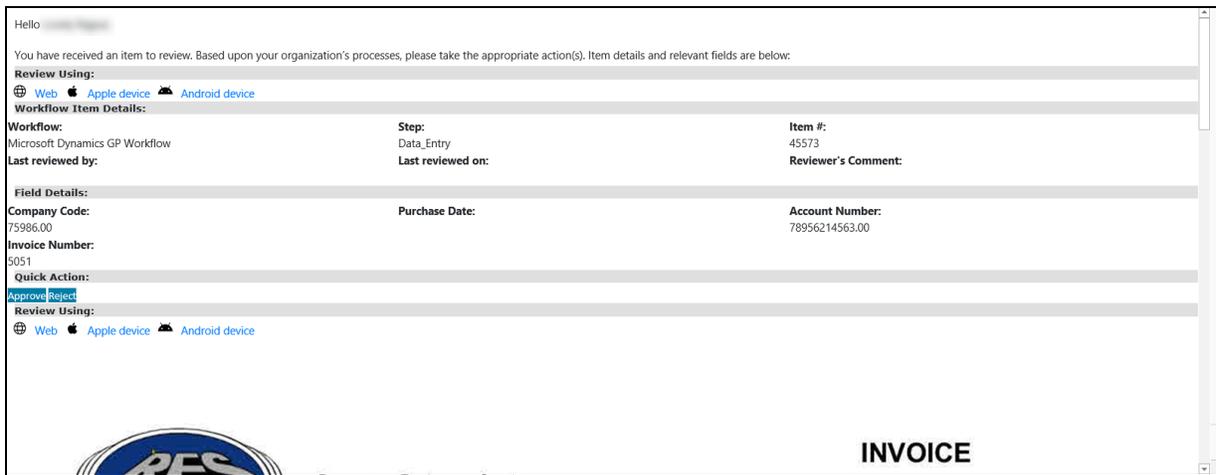
✓ [Test](#)
↻ [Reset](#)

Workflow eMail Alert in PaperSave 6 format:

Workflow eMail Alert in PaperSave 7 format:

## PaperSave 7 style eMail notification - Per Item

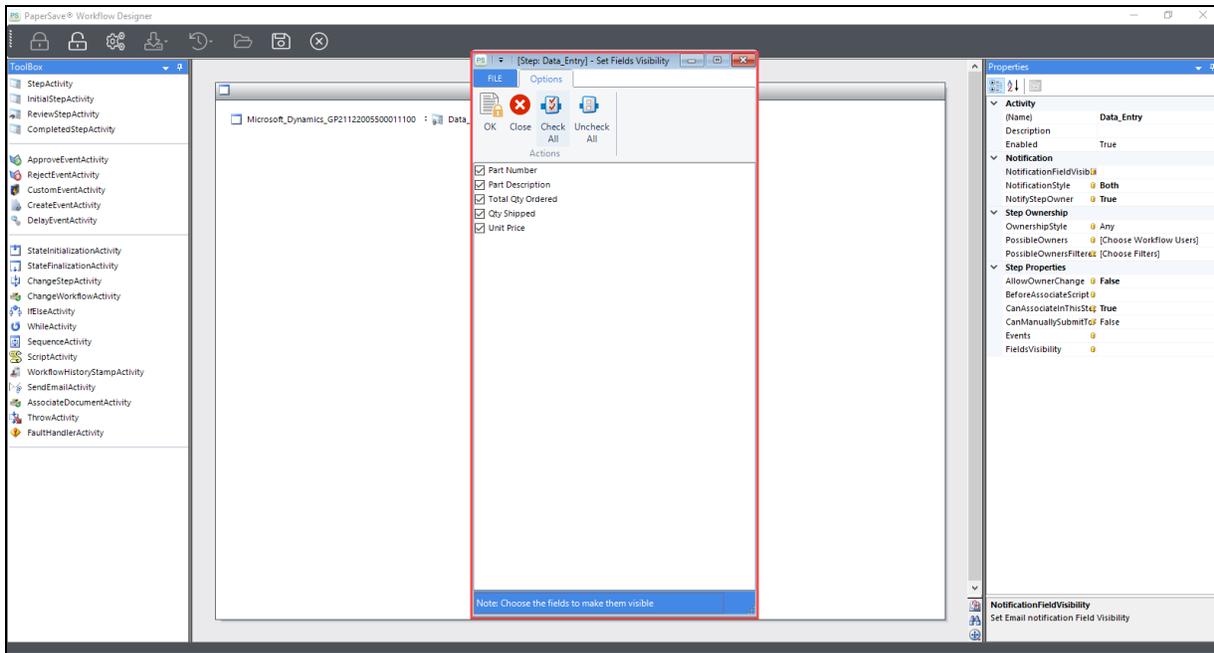
For notification style defined as "**Per Item**", you will receive the email notification in the following format. The email notification subject includes the Workflow name and Workflow ID.



The email for **Per Item** notification style is divided into the following sections:

1) **Workflow Item Details:** This section displays details such as Workflow name, current step of Workflow item, Workflow ID, last reviewer's name last review date and Reviewer's comments.

2) **Field Details:** This section includes the Workflow fields selected from the **NotificationFieldVisibility** field in the NotificationActivity section from the properties of Workflow designer as shown in the below screen:



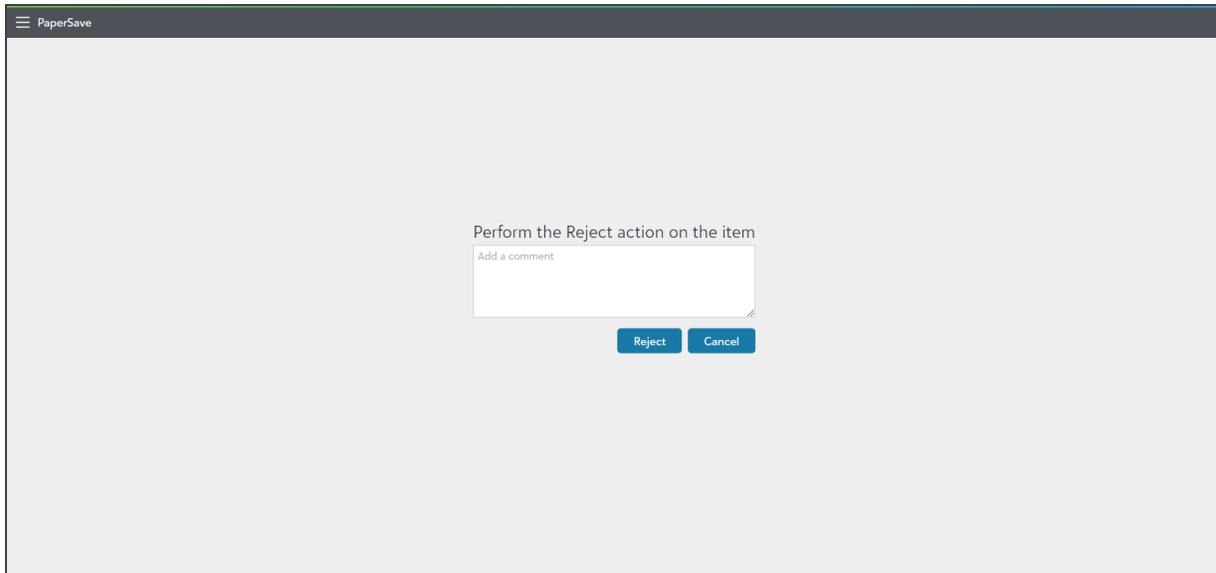
3) **Quick Action:** This section allows you to directly raise the Workflow event from the email. On clicking the event, it will navigate you to a web browser where you can enter the comment for the Workflow item. The events displayed in this section are configured in the Fields Details.

**Note:** You can perform any one action through Quick Action.



- When you raise any event for an item, then it will redirect you to PaperSave screen as shown below. Here, you can enter the comment and click on **Approve** to approve the item or on **Cancel** to exit the

PaperSave without raising an event.



- When any event is raised successfully, a success message will appear as shown below. Click on **Ok** to close the message.



4) **Review Using:** This section provides you the following three ways to review the Workflow item received in the email. You can click on the review hyperlink to view the Workflow item in respective PaperSave application variant.



- Web (review the item in a browser)
- Apple device (review the item in PaperSave iOS application)
- Android device (review the item in PaperSave Android application)

## PaperSave 7 style email notification - In Group

For notification style defined as **In Group**, you will receive the email notification in the format as shown below. The email notification subject includes the details such as Workflow name, Workflow Step name, and number of items to review.

Hello [REDACTED]

You have received items to review. Based upon your organization's processes, please take the appropriate action(s). Item details and relevant fields are below:

**Review Using:**

[Web](#) [Apple device](#) [Android device](#)

**Workflow Item Details:**

ID	Batch	File Name	Part Number	Part Description	Total Qty Ordered	Qty Shipped	Unit Price
 <a href="#">45585</a>		Franke Foodservice Supply, Inc-6.pdf	8955	Office supply	20	20	5
 <a href="#">45586</a>		Franke Foodservice Supply, Inc-6.pdf	45689	Supply	6	6	6
 <a href="#">45587</a>		Franke Foodservice Supply, Inc-6.pdf	5689		6	6	7
 <a href="#">45588</a>		Franke Foodservice Supply, Inc-6.pdf	56896	X49463-11	5	5	9
 <a href="#">45589</a>		TAYLOR FREEZER SALESGEORGIA.PDF	89565	Cables	5	5	12
 <a href="#">45590</a>		Restaurant Equipment Services.PDF	6565	Supply	3	3	2
 <a href="#">45593</a>		Franke Foodservice Supply, Inc-6.docx	89565	Medical Supplies	10	10	5

**Review Using:**

[Web](#) [Apple device](#) [Android device](#)

The email for **In Group** notification style is divided into the following sections:

1) **Workflow Item Details:** This section displays the group of Workflow items in the list form similar to Workflow item list in the Workflow Area. You can click on the hyperlink in an **ID** column to open the item directly in a standalone Workflow item viewer as shown in the below screen.

Hello [Name]

You have received items to review. Based upon your organization's processes, please take the appropriate action(s). Item details and relevant fields are below:

**Review Using:**

[Web](#) [Apple device](#) [Android device](#)

**Workflow Item Details:**

ID	Batch	File Name	Part Number	Part Description	Total Qty Ordered	Qty Shipped	Unit Price
 <a href="#">45585</a>		Franke Foodservice Supply, Inc-6.pdf	8955	Office supply	20	20	5
 <a href="#">45586</a>		Franke Foodservice Supply, Inc-6.pdf	45689	Supply	6	6	6
 <a href="#">45587</a>		Franke Foodservice Supply, Inc-6.pdf	5689		6	6	7
 <a href="#">45588</a>		Franke Foodservice Supply, Inc-6.pdf	56896	X49463-11	5	5	9
 <a href="#">45589</a>		TAYLOR FREEZER SALESGEORGIA.PDF	89565	Cables	5	5	12
 <a href="#">45590</a>		Restaurant Equipment Services.PDF	6565	Supply	3	3	2
 <a href="#">45593</a>		Franke Foodservice Supply, Inc-6.docx	89565	Medical Supplies	10	10	5

**Review Using:**

[Web](#) [Apple device](#) [Android device](#)

2) **Review Using:** This section provides you the following three ways to review any of the Workflow items received in the email. You can click on the review hyperlink to view the list of all the Workflow items in respective PaperSave application variant.

**Review Using:**

[Web](#) [Apple device](#) [Android device](#)

- Web (review the items in a browser)
- Apple device (review the items in PaperSave iOS application)
- Android device (review the items in PaperSave Android application)

**PaperSave 6 style email notifications - Per Item**

For notification style defined as "**Per Item**", you will receive the email notification in the following format. The email notification subject includes the Workflow item ID.



Review or Work the following item in your Workflow:

<b>Workflow Step</b>	Data_Entry
<b>Workflow</b>	Microsoft Dynamics GP
<b>Workflow Item ID</b>	45584
<b>File Name</b>	Franke Foodservice Supply, Inc-6.pdf
<b>Current Owner</b>	[Redacted]
<b>Approval</b>	[Redacted]
<b>Document Type</b>	Requisition Documentation
<b>Part Number</b>	59865
<b>Part Description</b>	Cables
<b>Total Qty Ordered</b>	5
<b>Qty Shipped</b>	5
<b>Unit Price</b>	10

For more information please review the PaperSave User Guide or go to [www.papersave.com](http://www.papersave.com)



### The PaperSave System



PaperSave is a product of [WhiteOwl](#)

The email for **Per Item** notification style is divided into the following sections:

- 1) **Workflow Item Details:** This section displays Workflow Fields/Document Type fields by default, which includes Workflow Step, Workflow name, Workflow Item ID, File Name, Current Owner, Approval and Document Type and all fields as configured in Workflow.
- 2) **Review Using:** This section provides you the following ways to review the Workflow item. You can click on the review hyperlink to view the Workflow item in respective PaperSave application variant.



- Web (review the item in a browser)
- iOS device (review the item in PaperSave iOS application)
- Android device (review the item in PaperSave Android application)
- Windows (review the item in a desktop application)

### PaperSave 6 style email notifications - In Group

For notification style defined as "**In Group**", you will receive the email notification in the format as shown below. The email notification subject includes the details such as Workflow name, Workflow Step name, and number of items to review.

Workflow Item ID	File Name	Gift Amount	Gift Date	Type of Gift	Check Number	Is anonymous	Acknowledgement date	Acknowledgement status	Payment method	Receipt status	Receipt date	Post date	Post status	Constituent	Company	Bank Account Number	Routing Number	Check Memo	Check Date	Using State Initialization	Comments	GIFTID	Test Hide	Doc Type	Comments
21709	IRS.tif	\$100.00	10/25/2021						Cash				Do Not Post	AAA Concretee	Franke Inc					No	false				
828	Citrix.pdf	\$100.00	10/25/2021	Donation	54564654		10/25/2021	Needs Acknowledgement	Cash	Do Not Receipt		10/25/2021	Do Not Post		Dynamics GP	4545465465				No	true				
881	FILE_1.pdf	\$100.00	10/25/2021	Donation					Cash				Do Not Post	AAA Concretee	RENXT					No	false				

For more information please review the PaperSave User Guide or go to [www.papersave.com](http://www.papersave.com)

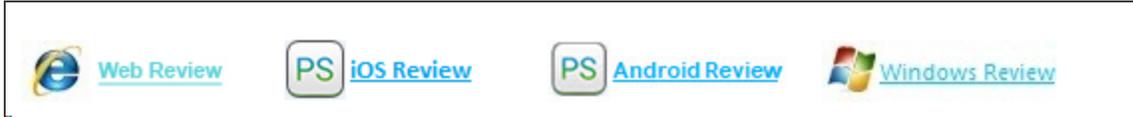
**The PaperSave System**

PaperSave is a product of [Solutions@MBAF.LLC](mailto:Solutions@MBAF.LLC)

The email for **In Group** notification style is divided into the following sections:

1) **Workflow Item Details:** This section displays the group of Workflow items in the list form similar to Workflow item list in PaperSave 7 Workflow Area.

2) **Review Using:** This section provides you the following ways to review the Workflow items. You can click on the review hyperlink to view the list of all the Workflow items in respective PaperSave application variant.

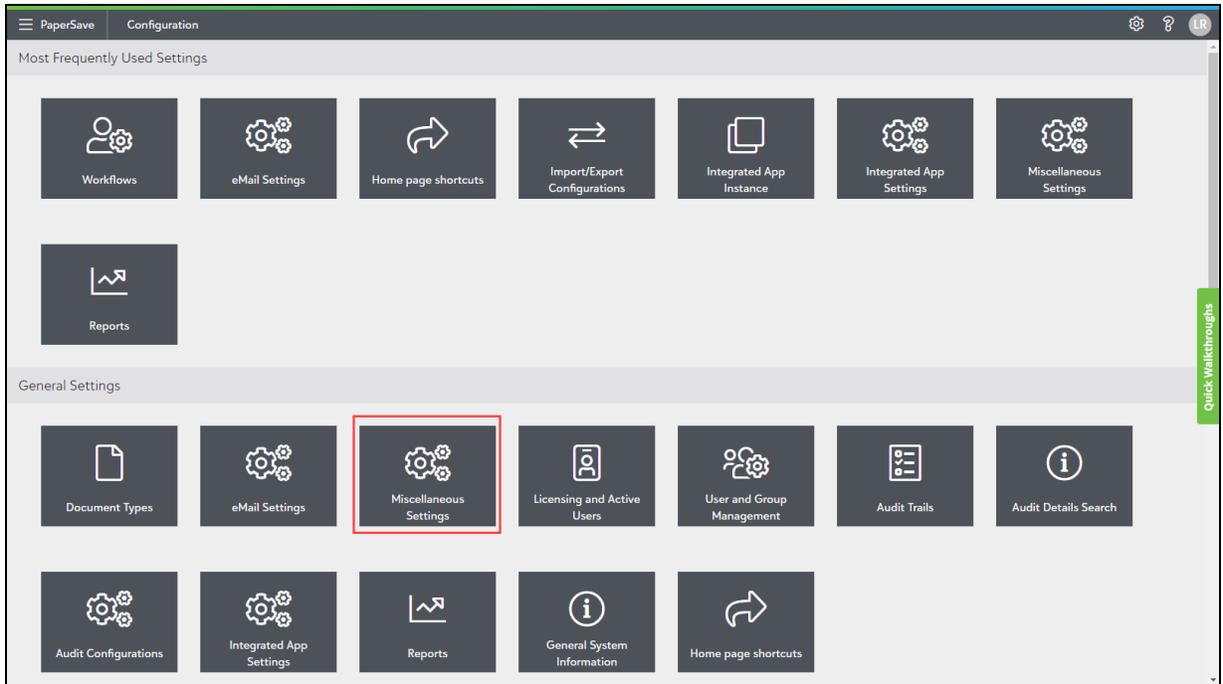


- Web (review the items in a browser)
- iOS device (review the items in PaperSave iOS application)
- Android device (review the items in PaperSave Android application)
- Windows (review the items in a desktop application)

## Miscellaneous Settings

You can define PaperSave related global configurations from within the Miscellaneous Settings option.

**Note:** The modified config value will be updated for all the other PaperSave users.



Watch the [video](#) to understand how to manage Miscellaneous settings.

**Note:** The Config Value will have a different user control based on the type of selected config. For Example, Text box, Toggle button, Dropdown, Date picker, etc.

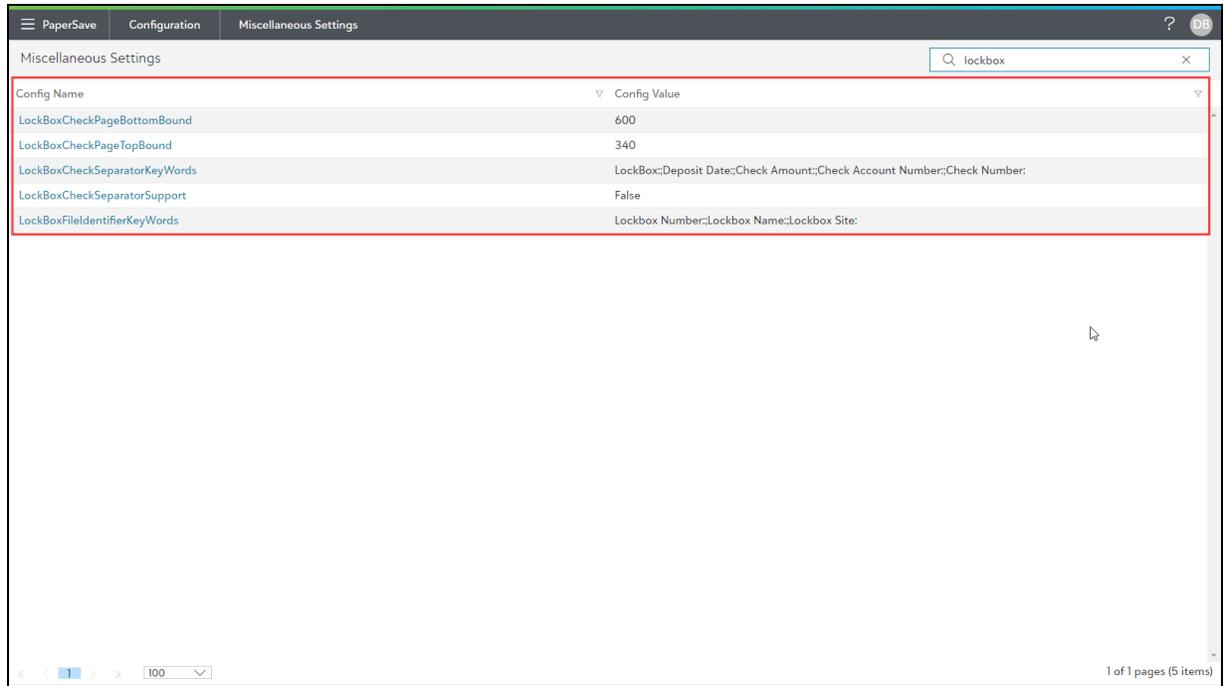
**Tip:** To save the updated value, you can either click on **X** in the dialog box or press **Esc** from the keyboard. To exit the Miscellaneous Settings, press **Esc** from the keyboard or click on **Configuration** from the breadcrumbs available in the application bar.

For the **Lockbox processed** files, you must configure the settings as mentioned in the below table:

ConfigName	Default Config Value	Description
------------	----------------------	-------------

LockBoxCheckSeparatorSupport	False	Change the value to True to enable the lockbox functionality in PaperSave
LockBoxFileIdentifierKeyWords	Lockbox Number;;Lockbox Name;;Lockbox Site:	Enter the keywords from the header section of the Lockbox file which helps in identifying the Lockbox file.
LockBoxCheckSeparatorKeyWords	LockBox;;Deposit Date;;Check Amount;;Check Account Number;;Check Number:	Enter the keywords from the footer section of the file after which the check separator should be processed.
LockBoxCheckPageTopBound	340	Enter the value from where the check extrac-

		tion should begin from the file. Based on this value, it calculates the starting location of the check's image in the file
LockBoxCheckPageBottomBound	600	Enter the value till where the check extraction should work. Based on this value, it calculates the end location of the check's image in the file

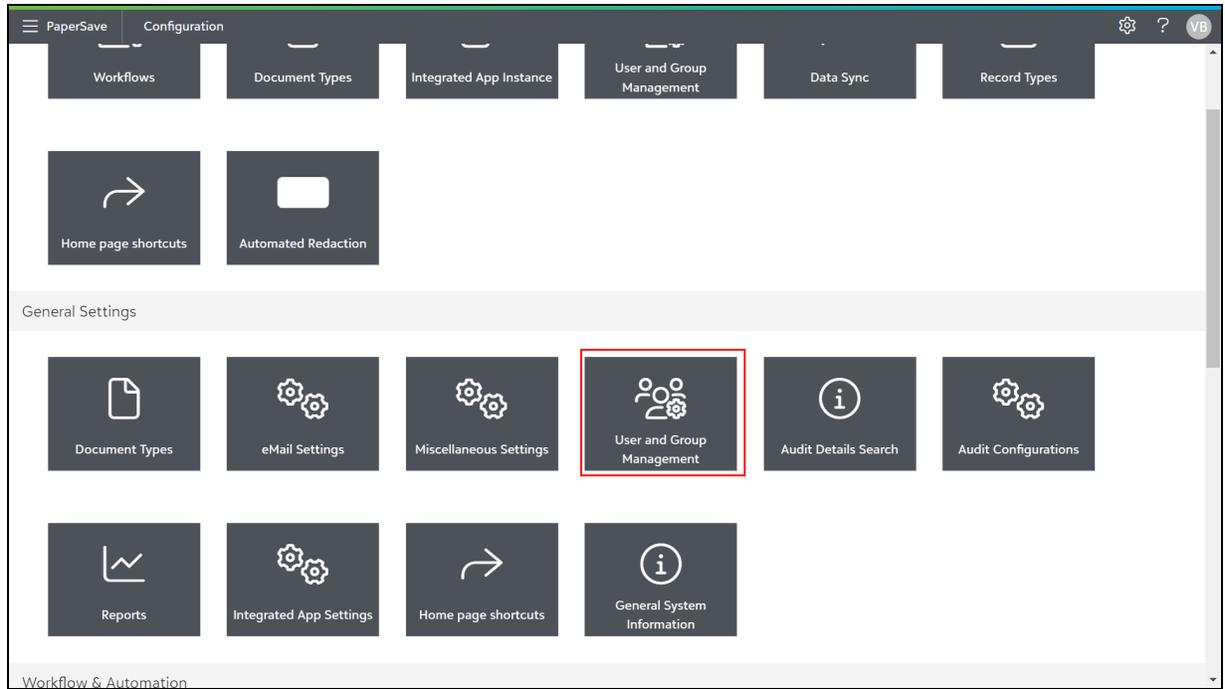


## User and Group Management

User and Group Management module, facilitates you to add Users and Groups using Native Authentication and view and manage (update/delete) Users and Groups using Microsoft Entra ID Authentication, Onelogin and Okta.

PaperSave introduces pre-defined system tags that can be assigned to users to define specific roles and grant access rights for various PaperSave modules. you can define dynamic custom tags to categorize pool of users.

User and Group management module can be accessed from the General Settings section of the Configuration Area, as shown in the below screen.



This module allows you to manage user details such as email address, notification style, user tags profile picture and set out of office preferences. Also, you can add users to different groups based on the organizational requirements for PaperSaveCloud Native Authentication.

The following topics are covered in this section:

- [Adding User](#)
- [Managing User](#)
- [Adding Group](#)
- [Managing Group](#)
- [Understanding Tags in User and Group management](#)

## **Adding User**

You can add users for tenants with Native Authentication only.

Watch the [video](#) to know how to add a new user in PaperSave User and Group management.

## **Managing User**

You can manage Users for tenants with Onelogin, Microsoft Entra ID authentication and Okta.

Watch the [video](#) to know how to manage a user in PaperSave.

### List Toolbar options for Users:

- **+ADD:** Click on **+ADD** to create a new PaperSave User.
- **CHOOSE FIELDS:** You can set desired preferences for the fields to be displayed in the current list of Groups using Choose Fields. Learn more about [Choose Fields](#).
- **EXPORT TO EXCEL:** You can export the complete or selected list of users from the list to Microsoft Excel sheet. The downloaded Excel file will appear as shown in the below screen.



Users

ADD IMPORT TAGS FOR USERS SWITCH TO LIST VIEW REFRESH

admin Search Against: All fields

Select All

<input type="checkbox"/>	<b>P</b>	Display Name: ps\Adminuat Exists In Directory: Yes	eMail address: [redacted] Tags: System Admin	User name: Adminuat Out of office: No	eMail notification preference:
<input type="checkbox"/>	<b>HK</b>	Display Name: HariKrishna Kummagiri Exists In Directory: Yes	eMail address: [redacted] Tags: System Admin	User name: hkummagiat Out of office: No	eMail notification preference:
<input type="checkbox"/>	<b>RS</b>	Display Name: Rajni Sharma Exists In Directory: Yes	eMail address: [redacted] Tags: AP Processor;reviewers;System Admin	User name: rasharmauat Out of office: No	eMail notification preference: In Group
<input type="checkbox"/>	<b>MM</b>	Display Name: Mutturuddinshah Mohammad Exists In Directory: Yes	eMail address: [redacted] Tags: System Admin	User name: mmohammaduat Out of office: No	eMail notification preference: Both

1 of 6 pages (54 items)

- **SWITCH TO CARD VIEW:** Click on this option to access the list of User details in Card style, as shown in the below screen.

Users

ADD CHOOSE FIELDS EXPORT TO EXCEL IMPORT TAGS FOR USERS SWITCH TO LIST VIEW REFRESH

admin Search Against: All fields

	Display name	Exists In Directory	User name	eMail address	Out of Office	eMail notification preference	Tags
<input type="checkbox"/>	ps\Adminuat	Yes	Adminuat	[redacted]	false		System Admin
<input type="checkbox"/>	HariKrishna Kummagiri	Yes	[redacted]	[redacted]	false		System Admin
<input type="checkbox"/>	Rajni Sharma	Yes	[redacted]	[redacted]	false	In Group	AP Processor;reviewers;System Admin
<input type="checkbox"/>	Mutturuddinshah Mohammad	Yes	[redacted]	[redacted]	false	Both	System Admin
<input type="checkbox"/>	Pamela Daley	Yes	[redacted]	[redacted]	false	Both	System Admin;Configuration Admin;Permissions Admin;User Admin;Workflow Super Admin
<input type="checkbox"/>	Rina Panchal	Yes	[redacted]	[redacted]	false		System Admin
<input type="checkbox"/>	Krusha Solanki	Yes	[redacted]	[redacted]	false	Both	System Admin
<input type="checkbox"/>	Priyank Sheth	Yes	[redacted]	[redacted]	false	Per Item	System Admin
<input type="checkbox"/>	Namrata Shukla	Yes	[redacted]	[redacted]	false		System Admin
<input type="checkbox"/>	Vivek Soni	Yes	[redacted]	[redacted]	false	Per Item	System Admin;Workflow Super Admin;User Admin;QALeads

1 of 6 pages (54 items)

- **REFRESH:** Clicking on **Refresh** updates the recent changes in the Users list.

## Adding Group

Groups can be defined in PaperSave to organize users based on the access rights as per the organizational needs. You can add users to Groups for tenants with Native Authentication. Multiple users having similar access rights can be clubbed under one group. Also, Users can be added to multiple groups based on the requirement.

Watch the following [video](#) to know how to add a new group in PaperSave.

## Managing Group

You can manage Groups for tenants with Onelogin, Microsoft Entra ID authentication and Okta.

Watch the [video](#) to know how to manage a Group in PaperSave.

### List Toolbar options for Groups

- **+ADD:** Click on **+ADD** to create a new PaperSave Group.
- **CHOOSE FIELDS:** You can set desired preferences for the fields to be displayed in the current list of Groups using Choose Fields. Learn more about [Choose Fields](#).

- **EXPORT TO EXCEL:** You can export the entire or selected list of Groups to Microsoft Excel Sheet as shown in the below screen.

	A	B	C	D	E	F	G	H	I	J
1	Group name	Description	Tags							
2	ax	ax	Configuration Admin							
3	ax-Depend Users keyword l	ax-Depend Users Keyword	Configuration Admin;Permissions Admin;System Admin;User Admin							
4	ax-Group100	ax-Group100	Configuration Admin							
5	ax-Group101	ax-Group101	System Admin							
6	ax-Group102	ax-Group102	System Admin							
7	ax-Group103	ax-Group103	Configuration Admin;User Admin							
8	ax-Group104	ax-Group104	User Admin;Configuration Admin;System Admin;Permissions Admin;Workflow Super Admin							
9	ax-Group105	ax-Group105	Configuration Admin;System Admin;Permissions Admin							
10	ax-Group106	ax-Group106	Configuration Admin;System Admin							
11	ax-Group107	ax-Group107	System Admin							
12	ax-Group108	ax-Group108	Configuration Admin							
13	ax-Group109	ax-Group109								
14	ax-Group110	ax-Group110								
15	ax-Group111	ax-Group111								
16	ax-Group112	ax-Group112								
17	ax-Group113	ax-Group113								
18	ax-Group114	ax-Group114								
19	ax-Group115	ax-Group115								
20	ax-Group116	ax-Group116								
21	ax-Group117	ax-Group117								
22	ax-Group118	ax-Group118								
23	ax-Group119	ax-Group119								

- **IMPORT TAGS FOR GROUPS :** You can import the tags for specific Groups from a CSV file with a pre-defined format (having two columns titled Group name and tags separated by semicolon). To import tags:
  - 1) Click on **IMPORT TAGS FOR USERS**. Select your CSV file from the dialog box and click on **Open**.
  - 2) Once you upload the file in the predefined format, the data from the file will be added to the Groups list.
- **REFRESH:** Clicking on **REFRESH** updates the recent changes in the Groups.

## Understanding Tags mechanism in User and Group management

User Tag mechanism allows you to assign tags to the users where you can just type in a new tag or select other tags from the dropdown that are entered by other users or select from a list of default system tags. Similarly, Tags can be added to Groups as well.

The following is a list of system tags offered by default in PaperSave:

- **Configuration Admin:** Users with this tag can access the Configuration area and all sections within EXCEPT for "User and Group Management", any permissions settings area in any document type, Workflow field, and Any workflow.
- **System Admin:** Users with this tag can access the Configuration area without any restrictions.
- **Permissions Admin:** Users with this tag also need the Configuration admin tag to get into the Configuration area. It will only let these users adjust permissions but not access any workflow or access the user and group management sections.
- **User Admin:** Users with this tag need the Configuration admin tag to get into the Configuration area. It will only let such users to adjust access the user and group management sections but will not let them change any permissions on objects or access any workflow.
- **Workflow Super Admin:** Users with this tag need the Configuration admin tag to get into the Configuration area. Having this tag will also let these users' access and adjust configuration on any and all Workflows (including workflow permissions) but not access the user and group management sections or change permissions on any other objects.

**Note:** When trying to access the Configuration Area (for the first time) without having the Configuration Admin tag for your user, you will be prompted to enter a Master password. You can login using the Master password to have the same rights as the user with the tag of System Admin.

## Audit Details Search

This module enables you to view the audit details for various actions performed in PaperSave by selected users for a specific date range.

**Note:** You must define your preferences for "**Audit Configurations**" before searching for Audit Details. Click [here](#) to learn more about Audit Configurations.

Watch the [video](#) to know the use of Audit Details Search.

### Search result list

Once you have selected the Search filters (as shown in the above video), click on **Search** to view the results as shown below:

Document ID	Action	Date	User	Machine
1194257	Add Workflow Item	07/31/2023 09:29:36 PM	Administrator	PC000001
1194258	Add Workflow Item	07/31/2023 09:37:16 PM	Administrator	PC000001
1193738	Modify WorkflowItem Metadata	08/01/2023 02:41:01 AM	Administrator	PC000001
1194262	Add Workflow Item	08/01/2023 03:05:38 AM	Administrator	PC000001
1194264	Add Workflow Item	08/01/2023 04:49:52 AM	Administrator	PC000001
1194264	Modify WorkflowItem Metadata	08/01/2023 04:50:35 AM	Administrator	PC000001
1194264	Modify WorkflowItem Metadata	08/01/2023 04:50:46 AM	Administrator	PC000001
1194266	Add Document	08/01/2023 05:10:10 AM	Administrator	PC000001
1194269	Add Workflow Item	08/01/2023 05:31:23 AM	Administrator	PC000001
1194269	Modify WorkflowItem Metadata	08/01/2023 05:31:39 AM	Administrator	PC000001

The following is a description of list toolbar options:

- **EXPORT TO FILE:** Click on this option to export the results list to a file. The default file name will be "AuditLogBackup " + Datetime with .pslog extension.
- **CHOOSE FIELDS:** This option enables you to configure the desired column fields to be displayed in the current list. Select the fields in the Choose Fields dialog box to view the corresponding column in the list.
- **EXPORT TO EXCEL:** Click on this option to export the log file in an excel format.

## View individual Audit Detail Search Result

Follow the below steps to view individual Audit Details:

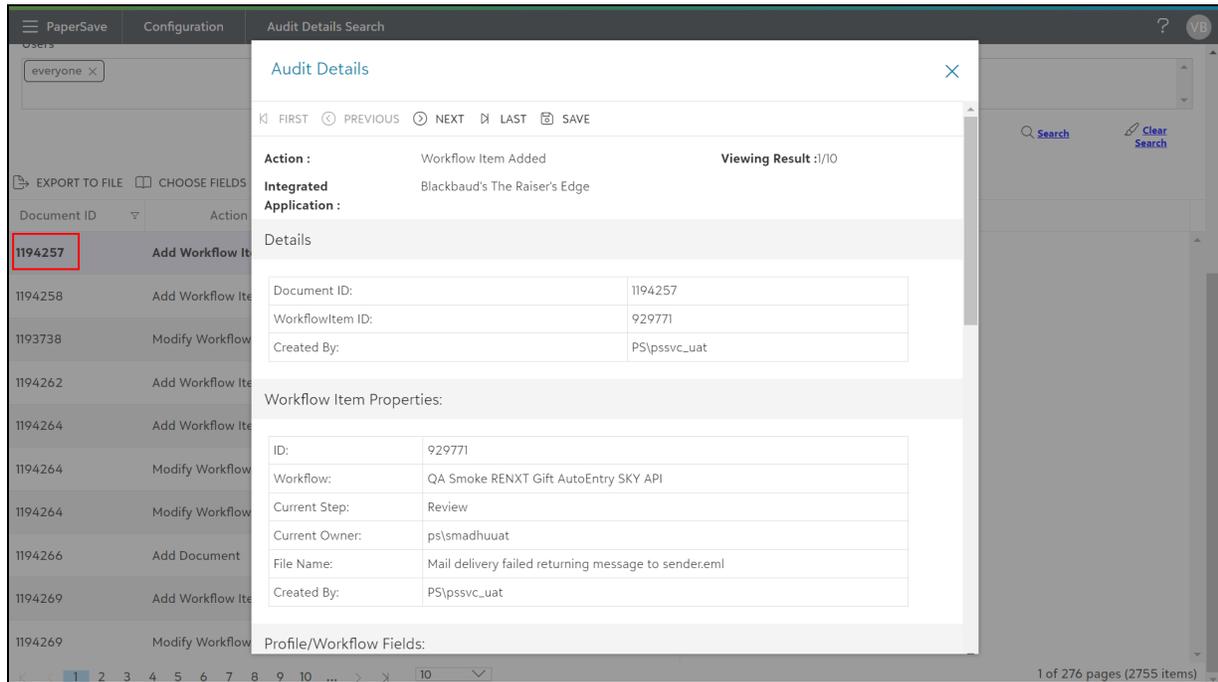
- 1) Double click on the individual item row to view the details for that specific item.
- 2) Audit Details dialog box will appear. Here you will see a toolbar with navigation buttons to move between items in the audit details results list.

The following is a description of various toolbar options in the Audit Details dialog box:

- **First:** Move to the first item of the audit details results list.
- **Previous:** Move to the previous item of the audit details results list.
- **Next:** Move to the next item of the audit details results list.
- **Last:** Move to the last item of the audit details results list.
- **Save:** Audit log details will be saved in a .HTML format with default name as "auditdetails".

3) You can also save the Audit log details by clicking **Save** button from the toolbar in audit details dialog box.

4) The Audit Details are categorized into various sections based on the actions viewed by the user.



## Audit Configurations

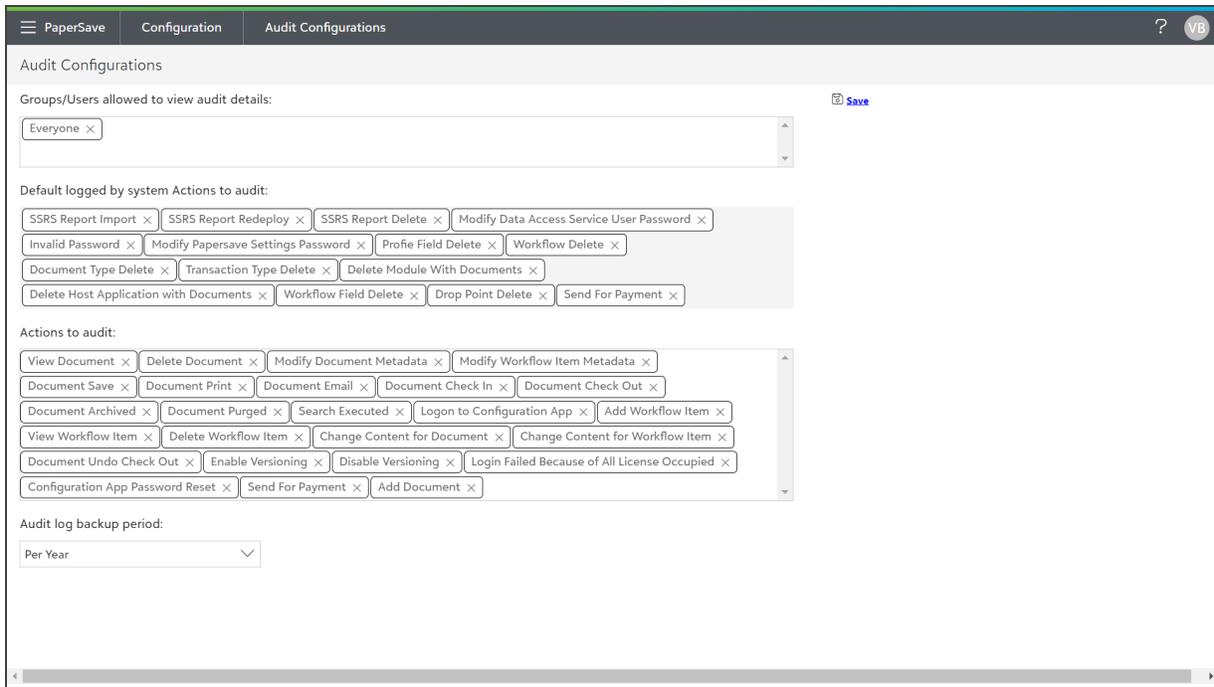
This section facilitates you to define the preferences for your PaperSave related audit logs. In this module, you can configure the Group/Users allowed to view the details, which system actions to audit, and the audit log backup period.

Watch the [video](#) to know the use of Audit Configurations.

The screen displays following options in the Audit configurations:

- **Groups/Users allowed to view audit details:** Enter the name of the user or group to whom you want to give permission to view Audit details.

- **Default logged by system Actions to audit:** This section displays the system actions to audit by default.
- **Actions to audit:** Click on the search box to select Actions performed by the selected users/groups in the log.



**Note:** The Default logged by system actions to audit will be captured in the audit logs. You are not allowed to add or remove any system actions. You can add desired actions to be captured in Audit Log in **“Actions to audit”** section.

### Audit Log backup period

You can choose the time for the audit log backup from the dropdown list. Once the backup is done, data will be purged automatically. The various options for backup period are:

- **Per Day:** The automatic backup for the audit log will be performed on daily basis.

- **Per Month:** The automatic backup for the audit log will be performed on monthly basis on the same date as the currently selected date.
- **Per Year:** The automatic backup for the audit log will be performed on a yearly basis on the same date & month as the currently selected date.

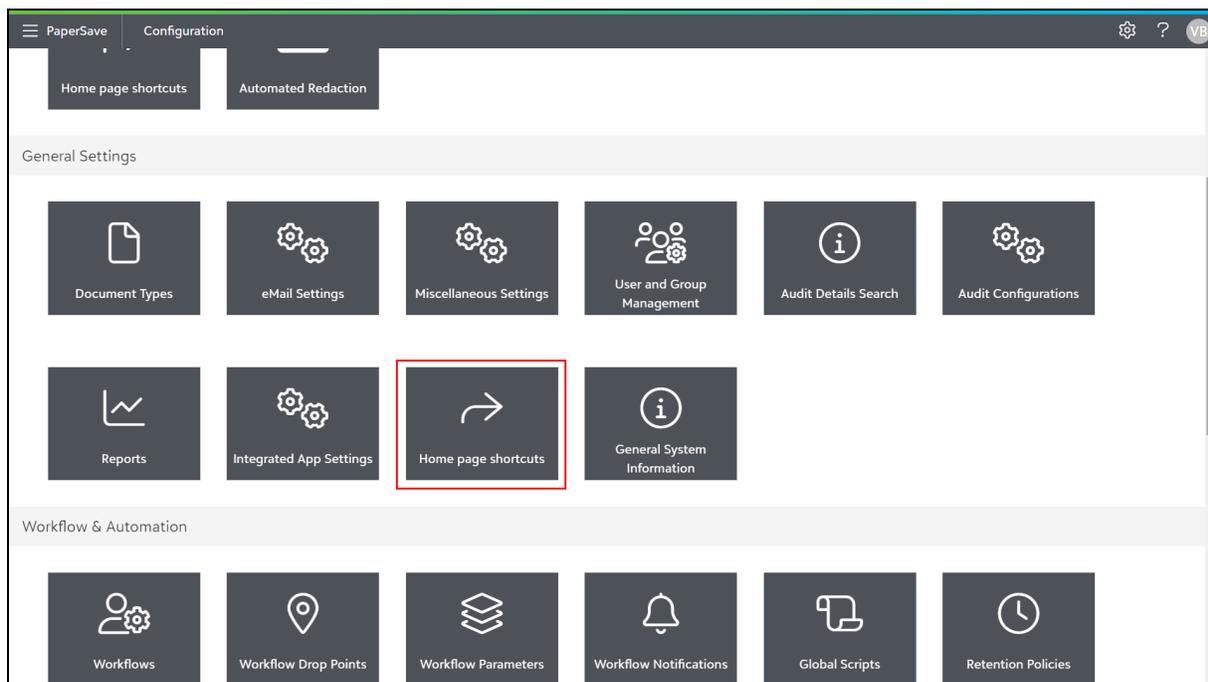
## Integrated App Settings

Watch the [video](#) to know about Integrated App Settings.

## Home page shortcuts

In addition to the default set of shortcuts available on the PaperSave Home, you can create custom shortcuts for quick access to the areas in PaperSave or any other web page.

These custom shortcuts can be created by clicking on the "Home page shortcuts" tile in the General Settings section of the Configuration Area, and they can be accessed from the PaperSave Home.



The Home Page Shortcuts module allows you to configure the shortcuts for two different mediums:

- 1) Web
- 2) Mobile

**Note:** Currently, you can define Home page shortcut only for Web medium.

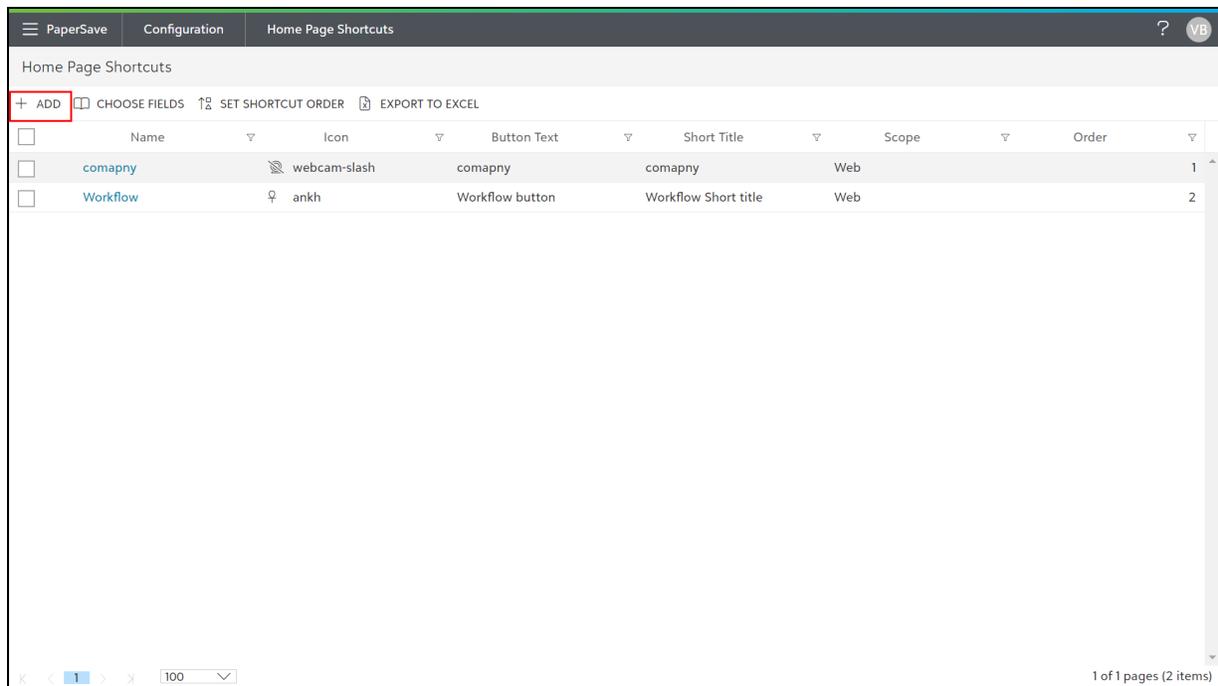
The following topics are covered in this section:

- [Adding Home page shortcut](#)
- [Managing Home page shortcut](#)
- [Set Shortcut Order](#)
- [Deleting Home page shortcut](#)

## Adding Home page shortcut

The following are the steps to add a custom shortcut to PaperSave Home:

- 1) Click on the **Home page shortcuts** tile in the General Settings section of the Configuration Area.
- 2) Click on the **+ADD** option from the list toolbar as shown in the below screen.



3) Now, enter all the required details to create the shortcut.

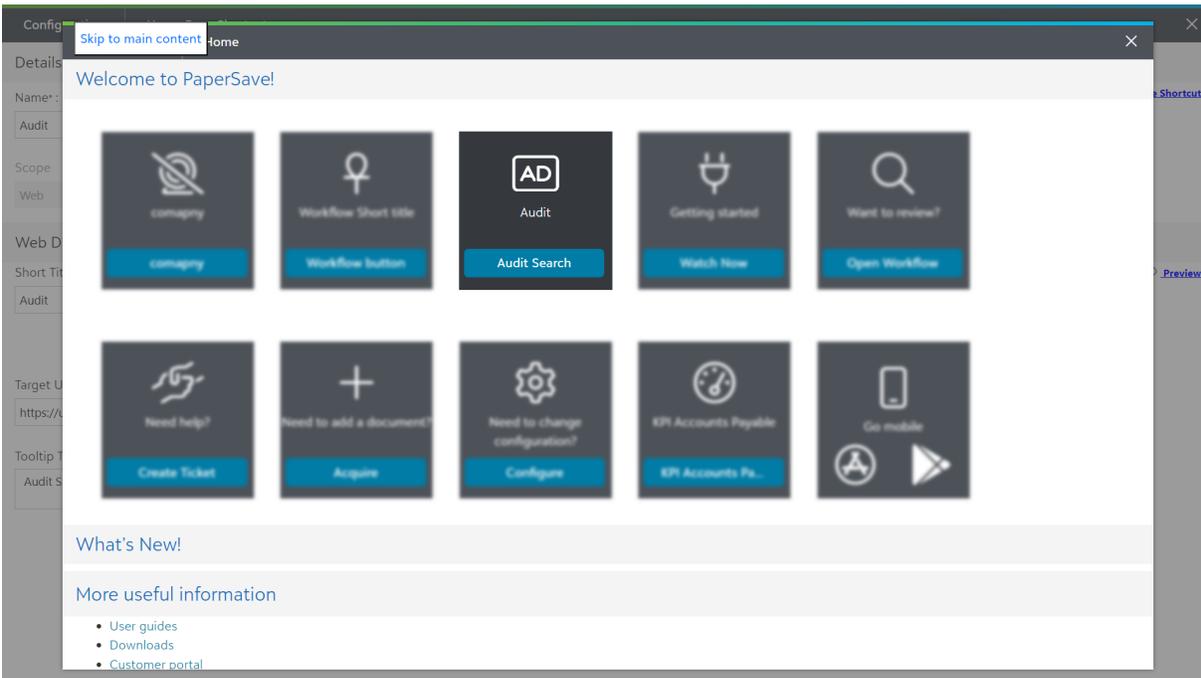
- **Name:** Enter the desired name for the shortcut.
- **Scope:** You can define the shortcut for Web and Mobile.
- **Short Title:** Enter the title to be displayed in the shortcut tile.
- **Icon:** Select the desired icon image from the list to be displayed on the shortcut.
- **Target URL:** Enter the destination URL where the shortcut should navigate when you click on the button.
- **Button Text:** Enter the text to be displayed on the button.
- **Tooltip Text:** Enter the text to be displayed when users hover over the shortcut icon.

The screenshot shows a configuration window titled "Home Page Shortcuts" with a "Configuration" tab. The window is divided into several sections:

- Details:** A "Name\*" field contains the text "Audit". A "Delete Home Page Shortcut" link is visible in the top right corner.
- Scope:** A "Web" option is selected.
- Web Details:** A "Short Title\*" field contains "Audit". An "Icon\*" field shows a selected icon labeled "audio-description". A "Preview" link is in the top right corner. A "Select Icon" link is located below the icon field.
- Target URL\*:** A text field contains "https://uatbeta.cloud.papersave.com/audit".
- Button Text\*:** A text field contains "Audit Search".
- Tooltip Text\*:** A text field contains "Audit Search".

4. Click on the **Preview** option to see how the shortcut looks in PaperSave Home before saving it, as shown in the below screen.

**Note:** You are required to fill in all the details before you can preview the shortcut.



5. Now, click on the **Save Home Page Shortcut** in the upper-right corner to save the new shortcut. In case you want to exit without saving it, click on the X in the upper-right corner or press an **Esc** from the keyboard.

## List Toolbar options in Home page shortcuts

The following toolbar options are available in Home page shortcuts:

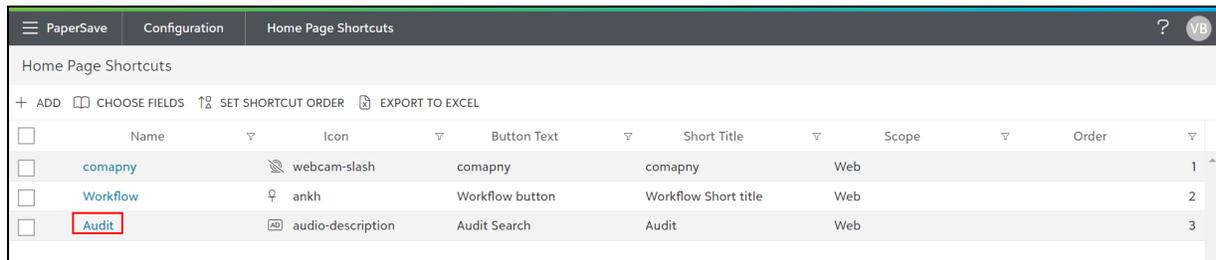
- **+ADD:** Click on **+ADD** to create a new Home page shortcuts.
- **CHOOSE FIELDS:** You can define the user preference to manage which field gets displayed in the current list of shortcuts using [Choose Fields](#).
- **SET SHORTCUT ORDER:** You can set the desired order of all the user-defined shortcuts available in the list. Click [here](#) to know more.
- **EXPORT TO EXCEL:** You can export the current list of shortcuts to Microsoft Excel Sheet.

**Note:** By default, new shortcut tile will be added before the pre-defined shortcuts and after the existing user-defined shortcut(s). You can change the order of the custom shortcuts by using the **Set Shortcut Order** option.

## Managing Home page shortcut

The following are the steps to edit an existing custom Home page shortcut(s) details:

- 1) Click on the **Home page shortcuts** tile in the General Settings section of the Configuration Area to open the list of shortcuts.
- 2) Click on the shortcut name to open it for editing.



	Name	Icon	Button Text	Short Title	Scope	Order
<input type="checkbox"/>	comapny	webcam-slash	comapny	comapny	Web	1
<input type="checkbox"/>	Workflow	ankh	Workflow button	Workflow Short title	Web	2
<input type="checkbox"/>	Audit	audio-description	Audit Search	Audit	Web	3

- 3) You can edit all the items on this page except for the scope. When you are finished with the edits, click on the **X** in the upper-right corner or press the **Esc** key from the keyboard to update the shortcut details.

Configuration | Home Page Shortcuts

Details

Name\*:  [Save Home Page Shortcut](#)

Scope\*:

Web Details

Short Title\*:  [Preview](#)

Icon\*:  [Select Icon](#)

Target URL\*:  Button Text\*:

Tooltip Text\*:

## Set Custom Shortcut Order

You can define the order in which the custom shortcuts should appear on PaperSave Home.

The following are the steps to set the desired order of the custom shortcuts:

- 1) Click on the **SET SHORTCUT ORDER** option from the list toolbar as shown in the below screen.

PaperSave | Configuration | Home Page Shortcuts

Home Page Shortcuts

+ ADD  CHOOSE FIELDS  **SET SHORTCUT ORDER**  EXPORT TO EXCEL

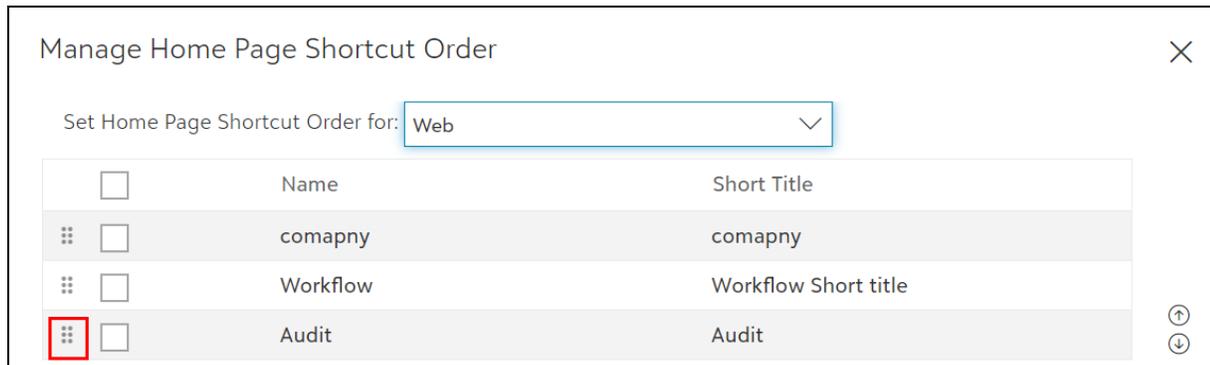
<input type="checkbox"/>	Name	Icon	Button Text	Short Title	Scope	Order
<input type="checkbox"/>	comapny		comapny	comapny	Web	1
<input type="checkbox"/>	Workflow		Workflow button	Workflow Short title	Web	2
<input type="checkbox"/>	Audit		Audit Search	Audit	Web	3

- 2) The **Manage Home Page Shortcut Order** dialog box will appear as shown in the below screen.

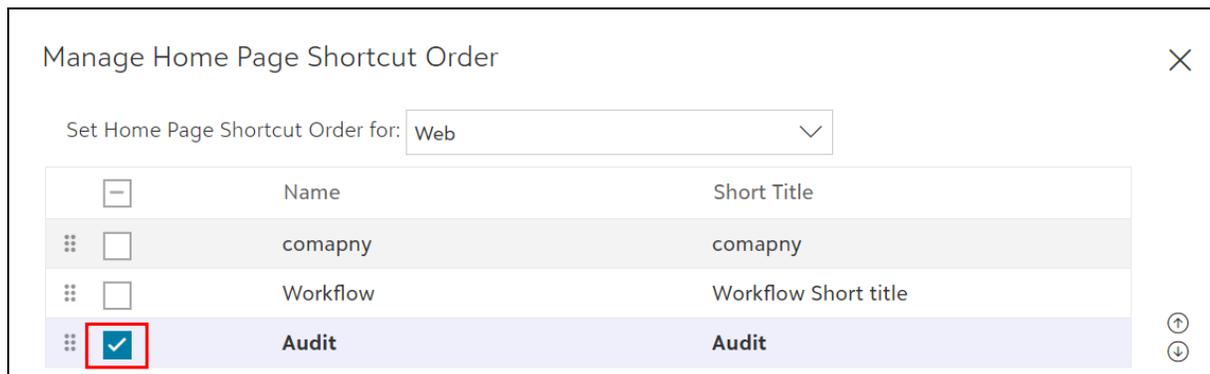
3) Select the scope from the "Set Home Shortcut Order for" drop down list to view the related shortcut list.

4) To change the order of the shortcuts, you can use either of these ways:

- **Drag** the shortcut using the **Ellipse** icon as shown in the below screen.



- **Select** one or more rows and move them using the arrow keys in the lower right-hand corner of the dialog box, as shown in the below screen.



5) Now, click on the **X** in the upper right-hand corner and click **Yes** to apply the change or **No** to cancel the operation.

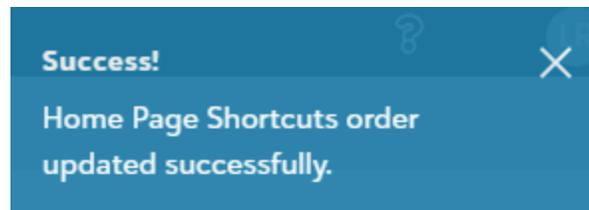
## Home Page Shortcut Sort Order

Are you sure you want to update the order for Home Page Shortcut?

Yes

No

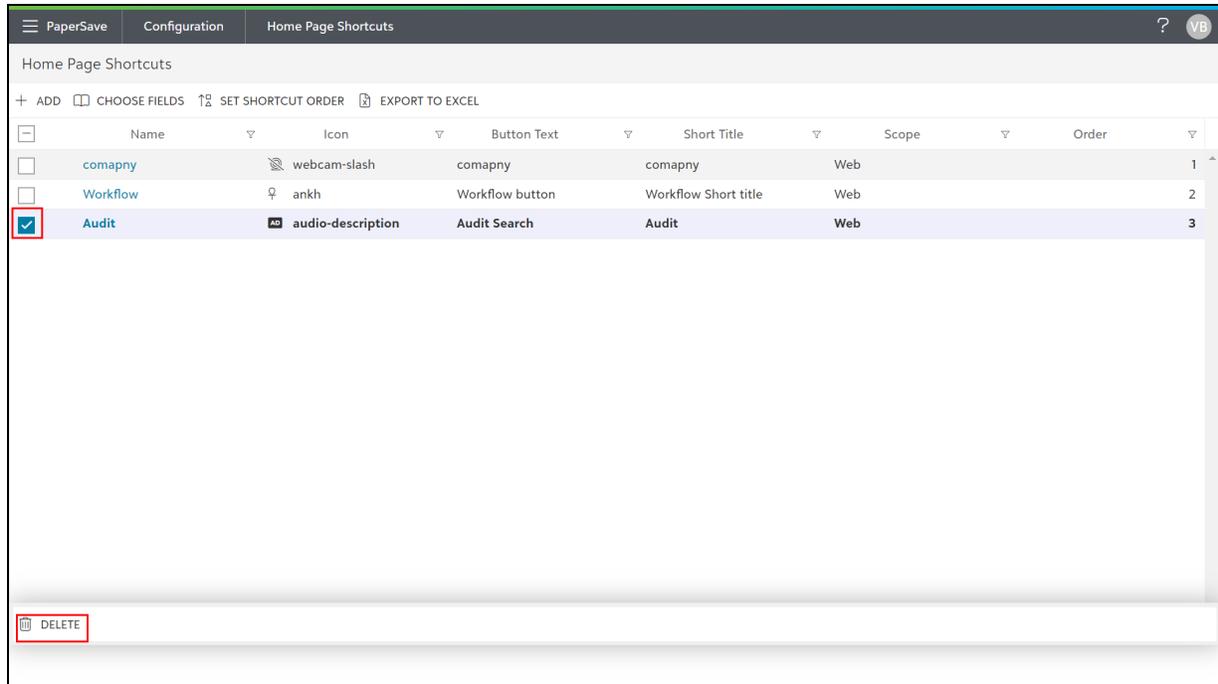
6. If the order is updated successfully, you will see a success message notification in the top-right corner. Else, it will show the failure message notification.



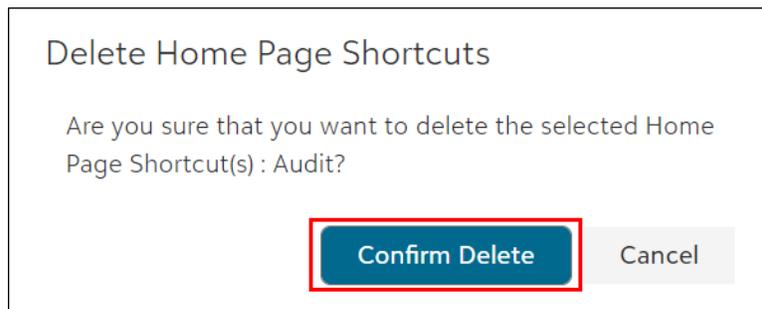
## Deleting Home page shortcut

There are two options for deleting an existing custom Home page shortcut:

1) Select one or more Home Page Shortcuts from the list using the checkboxes or directly selecting the rows, and then click on the **Delete** option from the slide-up panel as shown in the below screen.

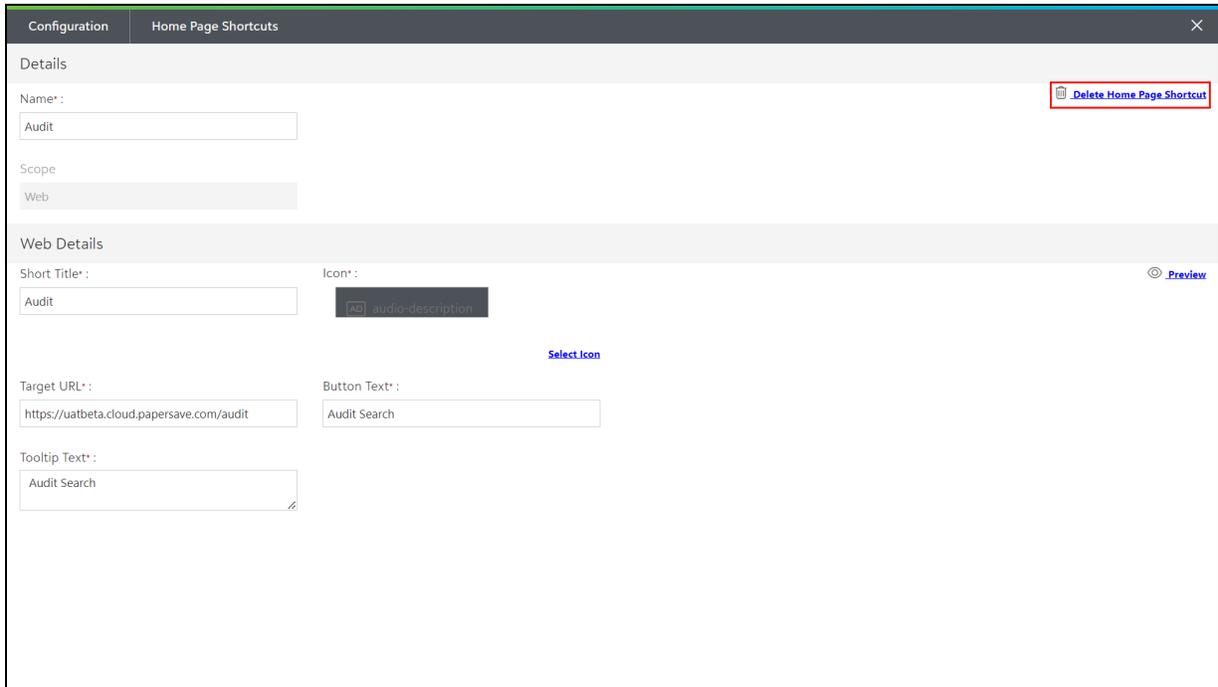


- Once you click on the **Delete** option, a confirmation message will appear, as shown on the below screen.

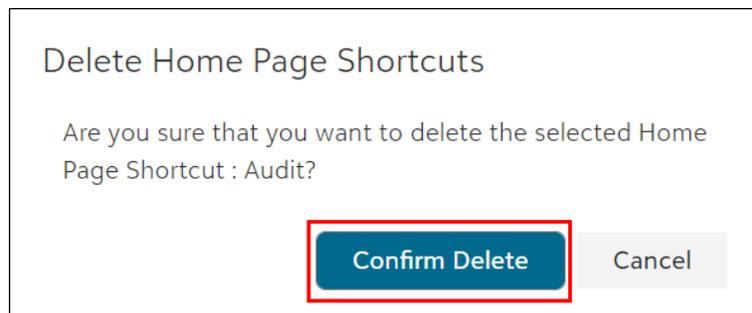


- Now, click on the **Confirm Delete** button if you want to perform a delete operation, or click on the **Cancel** button to abort.

2) On the other hand, you can also open any existing shortcut and click on the **Delete Home Page Shortcut** option in the upper-right corner as shown in the below screen to delete a specific home page shortcut.



- Once you click on the **Delete Home Page Shortcut** option, a confirmation message will appear, as shown on the below screen.



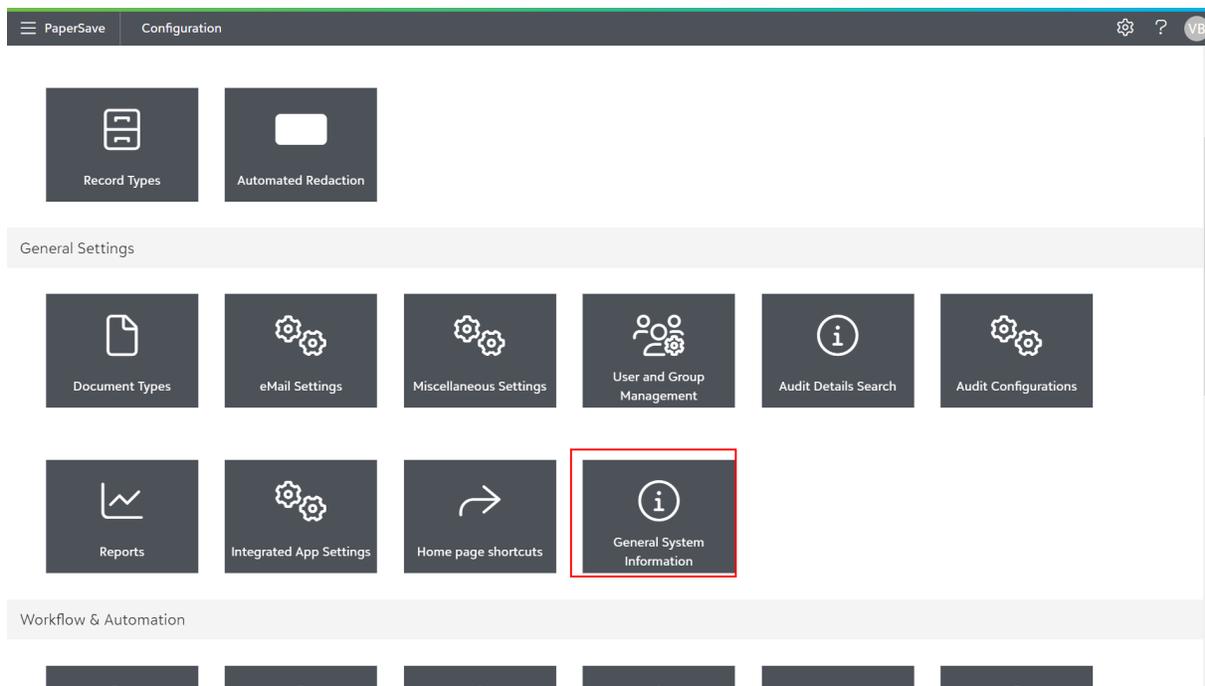
3) Now, click on the **Confirm Delete** button to perform the delete operation or the **Cancel** button to abort. Once the Home page shortcut is deleted, it will show success toast notification as shown below.



## General System Information

The following are the steps to view the General System Information:

1) Navigate to the "General Settings" section within the Configuration Area page.



2) Click on the "General System Information" tile to view information about your PaperSave System such as PaperSave version, PaperSave Site URL, PaperSave REST WebAPI API Documentation, and PaperSave Database Server.

### PaperSave Application System Information ✕

	PaperSave Version: <sup>i</sup> PaperSave 7.0	 <a href="#">Copy</a>
	PaperSave Site URL: <sup>i</sup> <a href="#">[Redacted]</a>	 <a href="#">Copy</a>
	PaperSave REST WebAPI API Documentation: <sup>i</sup> <a href="#">[Redacted]</a>	 <a href="#">Copy</a>
	PaperSave Database Server: <sup>i</sup> <a href="#">[Redacted]</a>	 <a href="#">Copy</a>

**Tip:** You can copy the required information using the "Copy" option beside the respective details.

Watch the [video](#) to know how to view General System Information.

## Workflow & Automation

The following topics are available in Workflow & Automation:

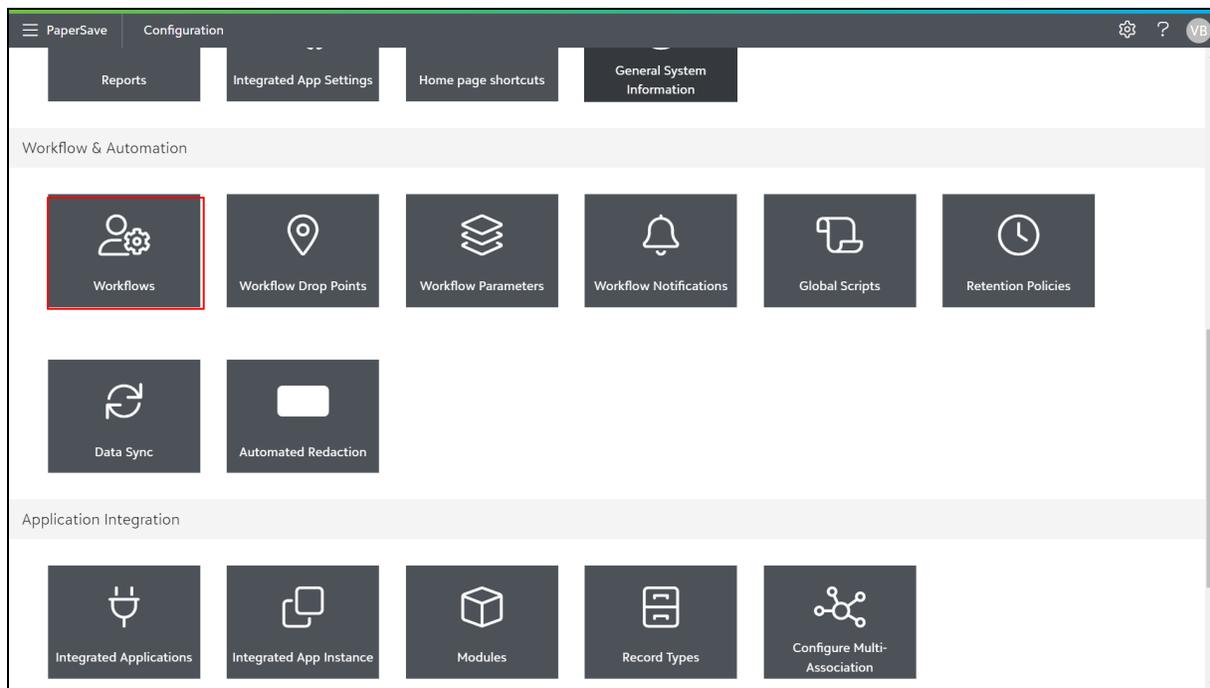
- [Workflows](#)
- [Workflow Drop Points](#)
- [Workflow Parameters](#)
- [Workflow Notifications](#)
- [Global Scripts](#)

- [Data Sync](#)
- [Custom Tables](#)

## Workflows

Workflows are the systematic flow in which documents are processed. This flow differs from organization to organization and from process to process. Workflows section allows you to add, design, and manage the Workflows.

- In the Configuration Area, access **Workflows** module by scrolling down to **Workflow & Automation** section as shown in the below screen.



The following are the topics covered in Workflows section:

- [Adding a new Workflow](#)
- [Managing the Workflows](#)

## **Adding a new Workflow**

Watch the [video](#) to know how to create a workflow.

## Workflow Designer

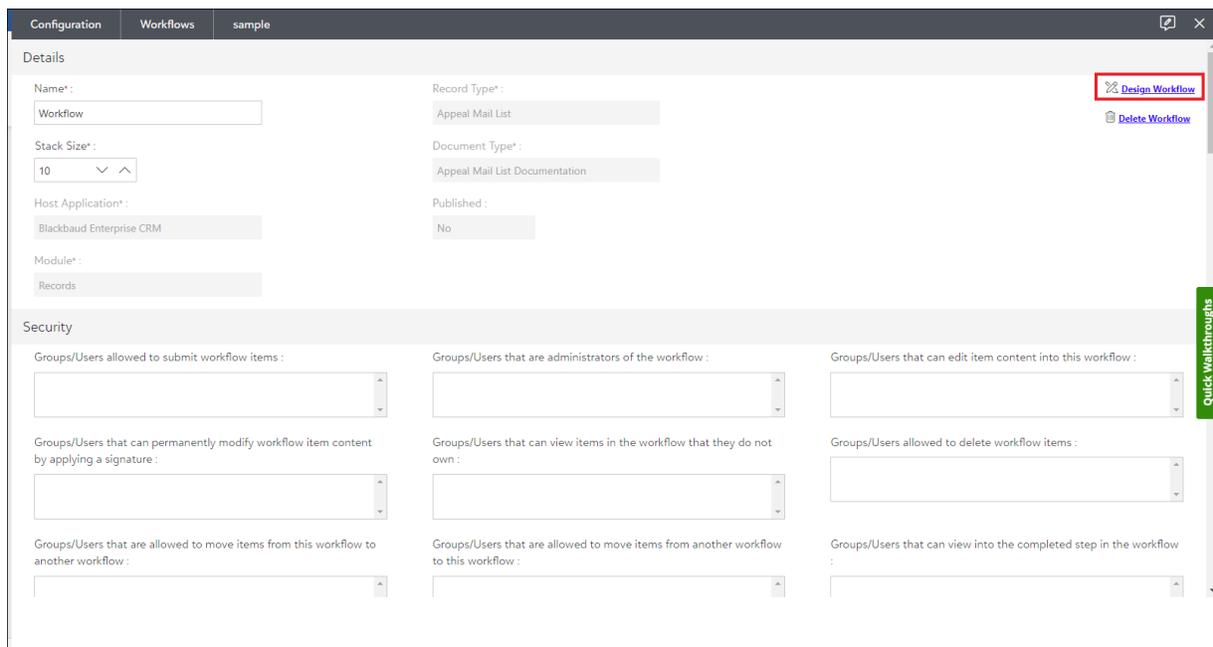
A PaperSave workflow can be created either by using predefined Workflow templates or by creating a custom workflow using the various options provided.

### Prerequisite

You must install [PaperSave Windows Client](#) to design a workflow. When you try to [design a workflow](#) for the first time, then the PaperSave Windows Client Installation setup appears on the screen. Follow the instructions given on the screen to install PaperSave Windows Client.

To design a workflow, do the following:

1) Go to the Workflow from PaperSave Navigation Menu >> Configuration Area >> Workflows >> click on a workflow and then click on the **Design Workflow**, as shown in the below screen. Log in to the PaperSave Workflow Designer with your PaperSave credentials.



The screenshot displays the PaperSave Workflow Designer interface. The window title is "Configuration Workflows sample". The "Details" section includes the following fields:

- Name\*: Workflow
- Record Type\*: Appeal Mail List
- Stack Size\*: 10
- Document Type\*: Appeal Mail List Documentation
- Host Application\*: Blackbaud Enterprise CRM
- Published: No
- Module\*: Records

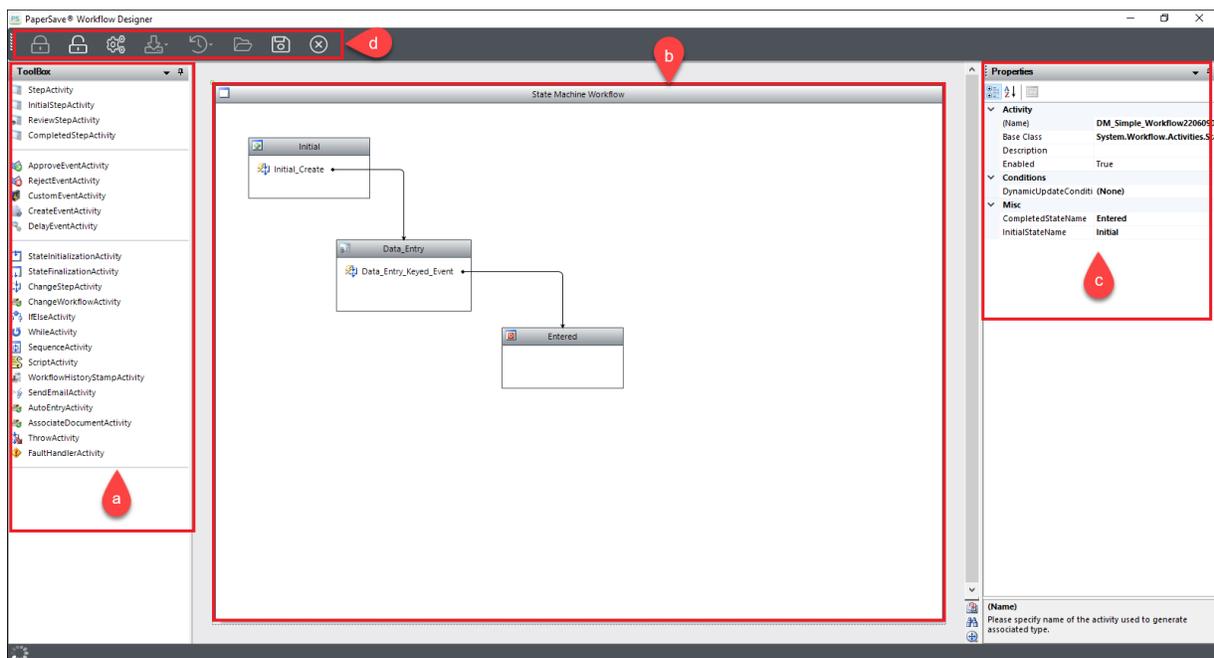
The "Security" section contains nine dropdown menus for assigning permissions:

- Groups/Users allowed to submit workflow items :
- Groups/Users that are administrators of the workflow :
- Groups/Users that can edit item content into this workflow :
- Groups/Users that can permanently modify workflow item content by applying a signature :
- Groups/Users that can view items in the workflow that they do not own :
- Groups/Users allowed to delete workflow items :
- Groups/Users that are allowed to move items from this workflow to another workflow :
- Groups/Users that are allowed to move items from another workflow to this workflow :
- Groups/Users that can view into the completed step in the workflow :

A red box highlights the "Design Workflow" button in the top right corner. A "Quick Walkthroughs" sidebar is visible on the right edge.

2) PaperSave Workflow Designer screen appears. Workflow Designer screen has the following four main components:

- a) **Toolbox:** This section displays all the steps, events, and activities that can be used for designing the Workflow.
- b) **State Machine Workflow (Design Area):** This section is the area where you create the Workflow.
- c) **Properties:** This section displays the properties of the steps, events, and activities (Toolbox) used in designing the Workflow.
- d) **Ribbon:** This section provides various options to perform different tasks.

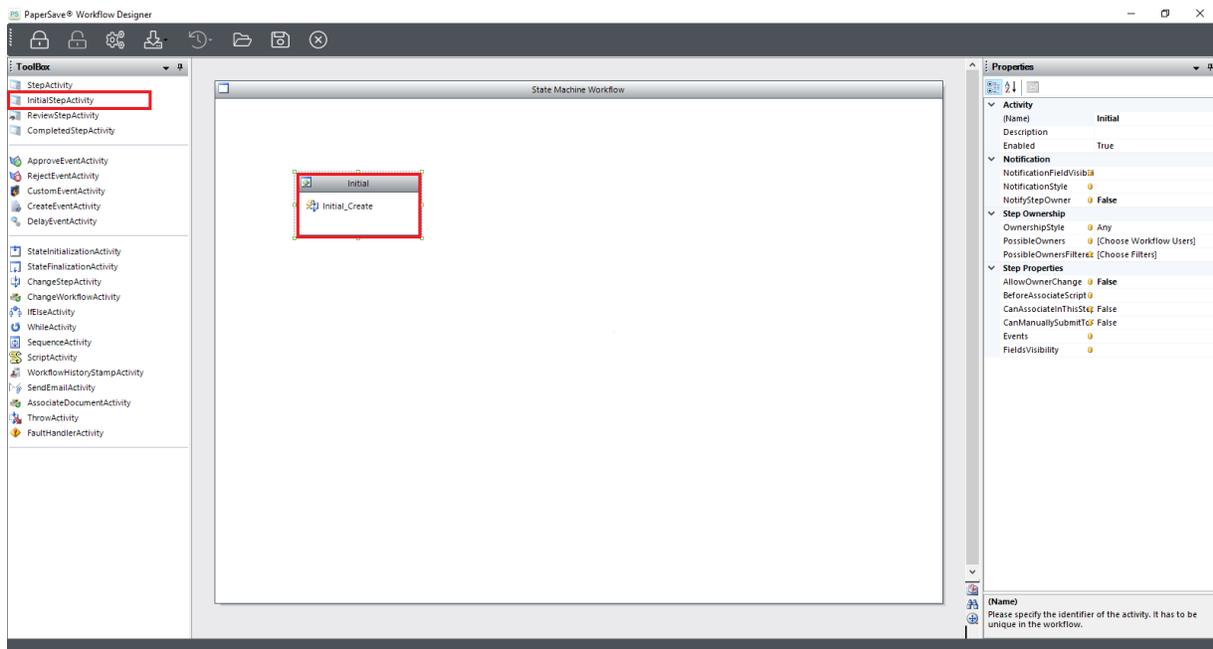


## Designing a Workflow

You may either create a Workflow from scratch, where you can define the events and activities according to your requirements, or by using an existing Workflow Template, where all events and activities are predefined.

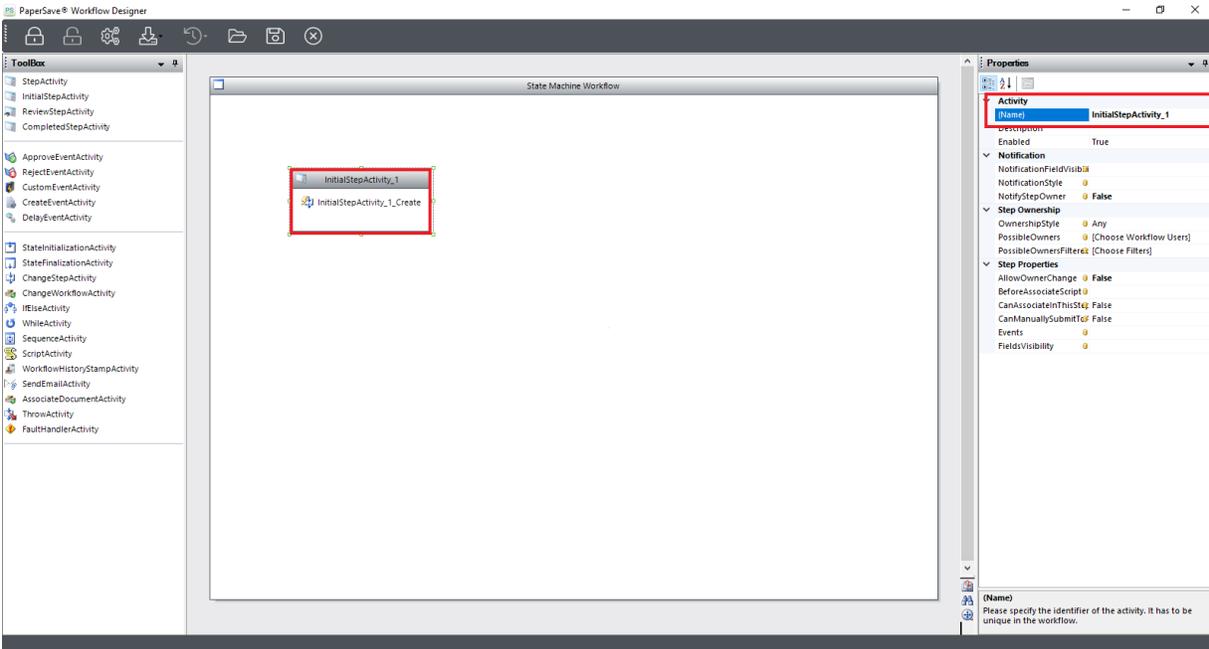
If you want to design a workflow from scratch, then do the following:

1) First, you need to define an Initial Step Activity, which will serve as a starting point for items in the Workflow. To do this, drag and drop the "InitialStepActivity" from the toolbox at the left into the Design Area, as shown below.



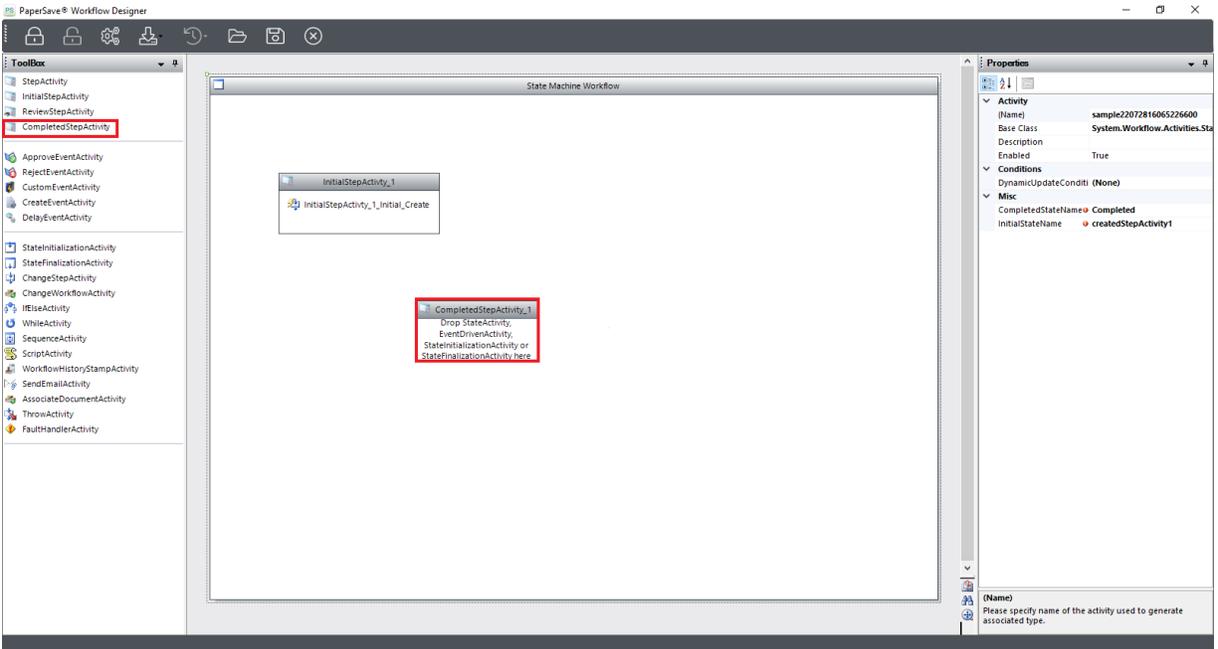
**Note:** If you are using a predefined Workflow Template, then all activities will have predefined events.

2) As you drag the InitialStepActivity into the Design Area, the Properties of the InitialStepActivity will be enabled at the right. Now, give a name to this InitialStepActivity. For Example, to name InitialStepActivity as InitialStepActivity\_1, select the Initial Step Activity in the Design Area and then replace the default name with InitialStepActivity\_1 in Properties. Similarly, you can define other details for the workflow step in the properties. Each event has its set of properties. Click [here](#) to know more about Properties.

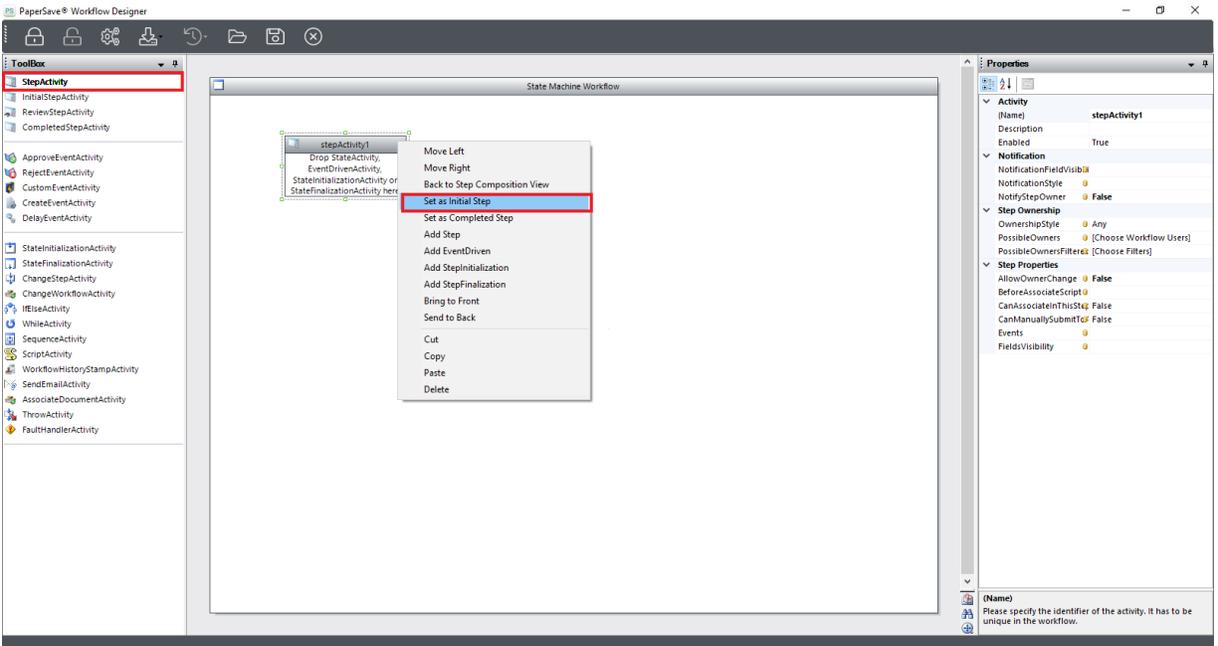


**Note:** Make sure that the name must not contain any space, or you may use an underscore between the words.

3) Along with the Initial Step, every Workflow must have a Completed Step to serve as the ending point for items within the Workflow. This is created in the same way as the Initial Step. Drag and drop CompletedStepActivity and give a name to it.



**Note:** If you are using any other StepActivity to define an activity, then you may drag and drop StepActivity, right-click on it and select "Set as Initial Step" or "Set as a Completed step" from the menu.



4) If you want to add Approve, Reject, or a Custom event within a step, then drag and drop ReviewStepActivity in the step, where you can view the Review\_Approve and Review\_Reject events that are predefined.

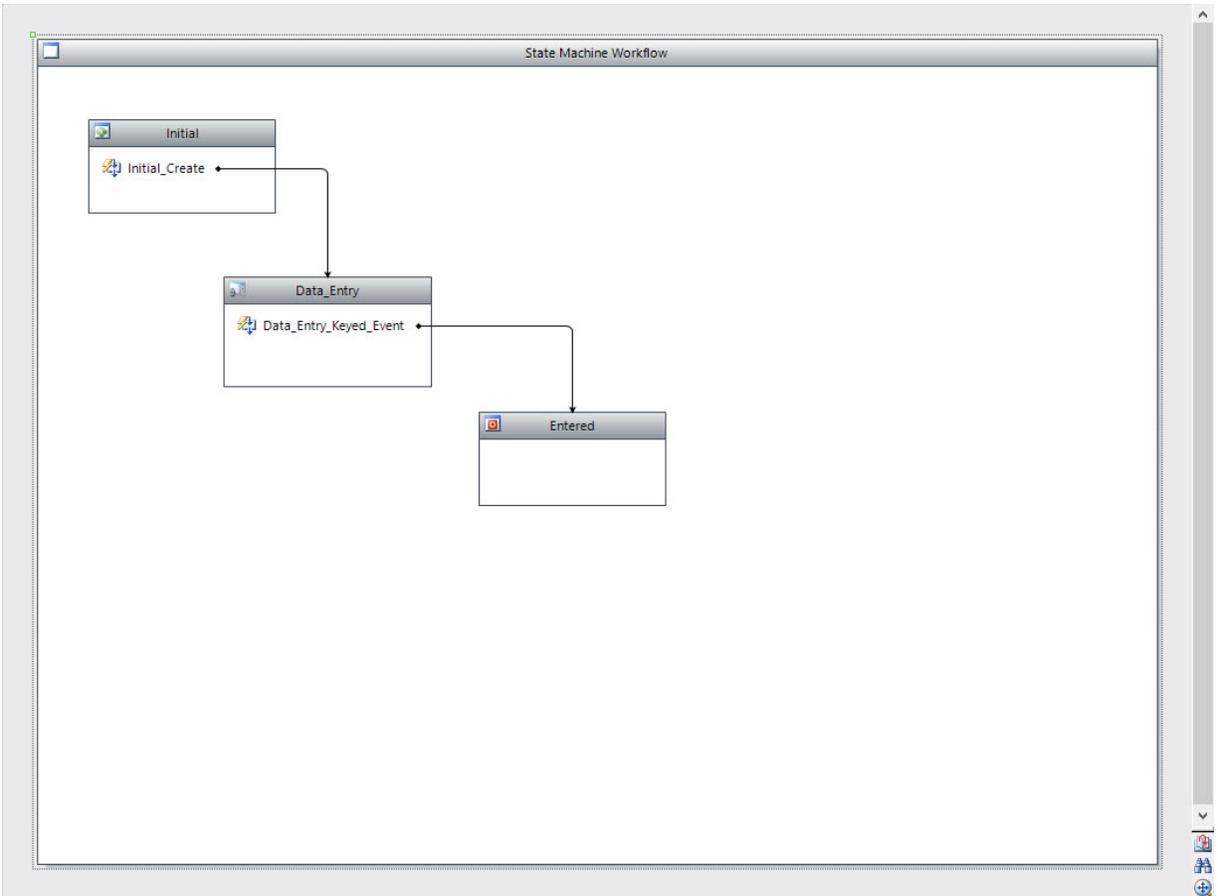
5) The steps you choose to create between the Initial Step and the Completed Step depend on the process for the Workflow. Each step in the workflow represents a step in the process, external actions, or activities events that cause an item to change step or transition a document from one step to another. Each step will contain different Events (acts as buttons) you can define for the process, which can be any of the mentioned below:

- **ApproveEventActivity:** This is an Approve activity, used to move the Workflow Item from one state of Workflow to others.
- **RejectEventActivity:** This is a Reject activity, used to reject the Workflow Item and stop moving it to the next stage of the Workflow. In such a case, the item stays at the same event or moves back to the last raised event.
- **CustomEventActivity:** This allows you to set the customized event.
- **DelayEventActivity:** This allows you to set a time after which you want to trigger an activity.

There are items within each event that performs a specific action. Click [here](#) to know more about the Steps and Activities.

**Tip:** When creating a Workflow from scratch, it is usually easier to create all the Steps before defining all the actions.

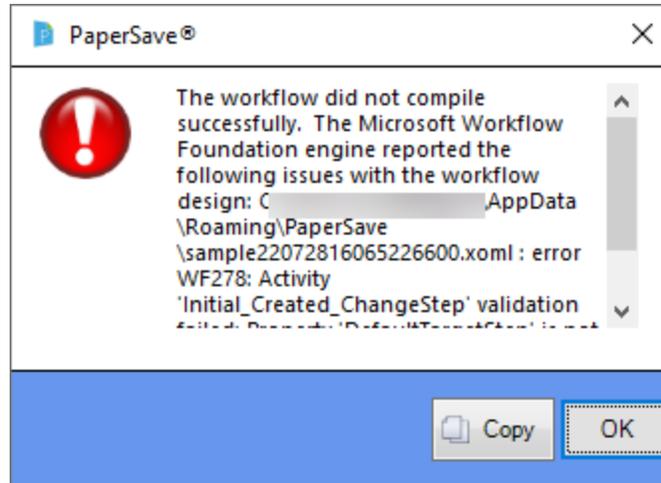
7) After creating the workflow step activity, you may now link the stepactivities with each to define the sequence of the stepactivities by bringing the cursor near the event activity and dragging and dropping the green dot from the first workflow step to the next workflow step, as shown in the below image. Similarly, you may connect other workflow steps.



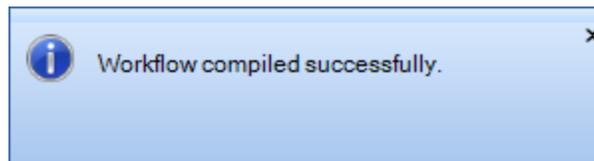
8) Once the Workflow is designed, you can compile the Workflow to check whether it is correct or not. To compile a Workflow, click **Compile Workflow** on the toolbar.



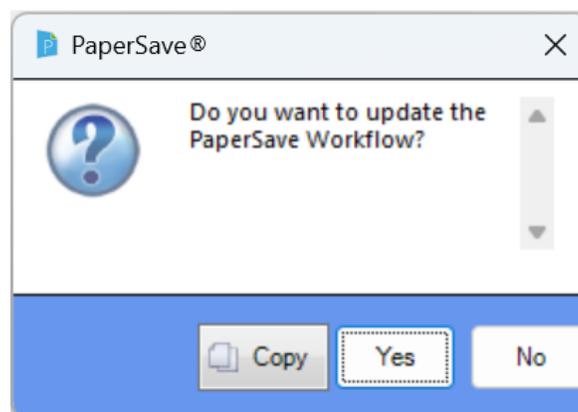
If the Workflow is not compiled successfully, then the following type of message will appear.



If the Workflow is compiled successfully, then the following message will appear.



**Note:** In case, the designed Workflow or modified Workflow template is not saved, and you are trying to close the designer, then you will be asked to save the current Workflow. To continue saving, click on the **Yes** button and exit the window.

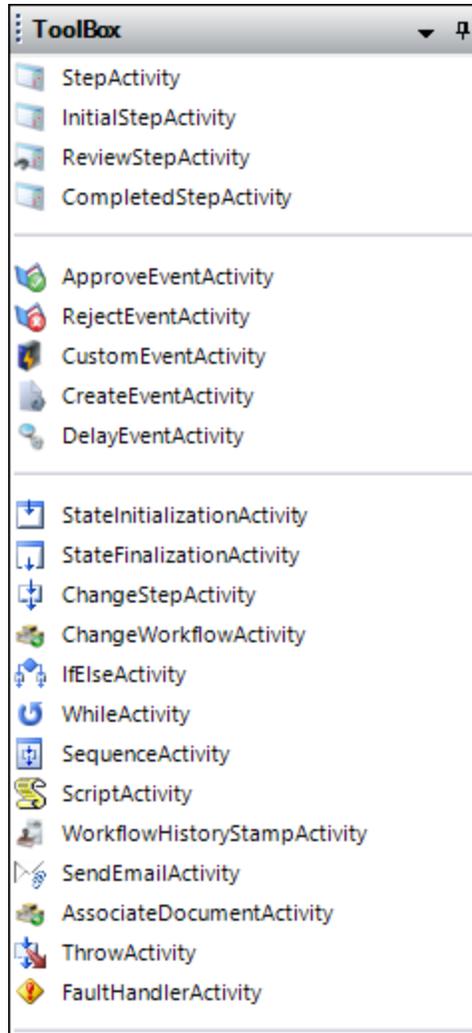


The following topics are covered in this section:

- [Using Steps and Activities](#)
- [Ribbon Options](#)

## **Using Steps and Activities**

The Toolbox in the Design Screen contains pre-defined Steps and Activities which can be used to build a Workflow, as shown in the following image. When you drag and drop a step activity on the Design Area, then its respective Properties panel is displayed at the right panel from where you can set the activity basic details, notification settings, step ownership, and step properties.



The toolbox contains the following three types of activities:

1) **Activity for Steps:** This is the activity that you will be using to create basic steps within your Workflow and Event-Driven Activities.

**Note:** If you are using an existing Workflow Template, then the activities will be prefilled in each step.

a) **StepActivity:** Allows creating basic steps that can be used to host Event-Driven Activities.

b) **InitialStepActivity:** A Step Activity contains an Event-Driven Activity named an Initial Step Activity. It includes a Target Step to identify the step you want the item to go to upon the Create Event.

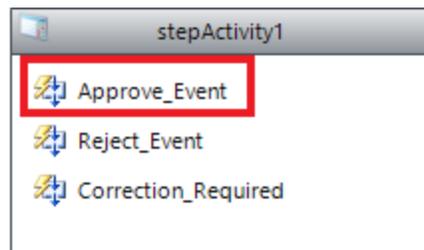
c) **ReviewStepActivity**: Allows to contain Approve and Reject Event-Driven Activities.

d) **CompletedStepActivity**: This step does not contain any activity and is the last step in the workflow.

2) **Event-Driven Activity**: This activity defines Events within Step Activities. PaperSave includes a few extra pre-defined Step Activities for common functions to save time which are known as Composite Step Activities.

There are the following step activities as mentioned below:

a) **ApproveEventActivity**: This is an Approve activity, used to move the Workflow Item from one state of Workflow to another.



- When you select this event, then its properties are displayed on the right. You may change the name of the event, specify its description, enable/disable the event, and so on.
- Double-click on the Approve\_Event from where you can set the properties for the Approve button.

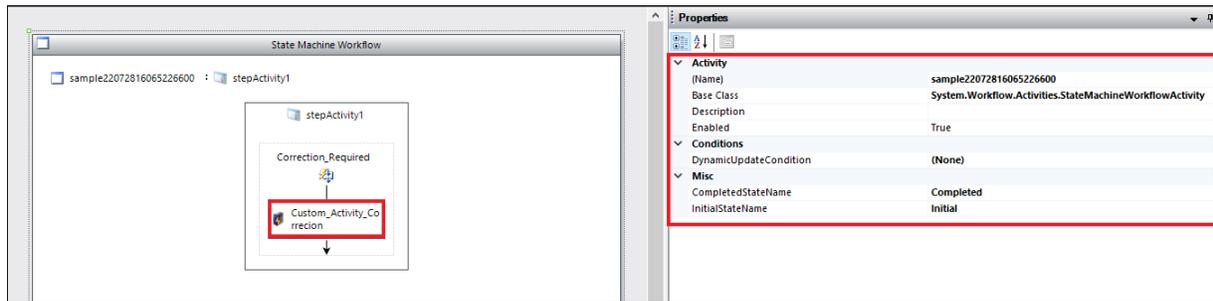
b) **RejectEventActivity**: This is a Reject activity, used to reject the Workflow Item and stop moving it to the next stage of the Workflow.

c) **CustomEventActivity**: This allows you to set the customized event. When you drag and drop a custom event, then the following screen appears from where you can set the event properties:

- **Name\***: Enter the name that you want to give to the custom event. For Example, Correction Required.
- **Small Image/Large Image**: Upload an image that you want to use for the event.
- **Color\***: Set the color in which you want to get the event displayed in the workflow item history.
- **Description**: Enter the description to give details about the event.

- **Rank:** Specify the rank that defines the order in which the button will be displayed.
- **Save:** Click on the **Save** button to save the properties.

When you click on the custom event, then the respective properties are displayed.



### Note:

Fields marked with an asterisk (\*) are mandatory fields.

ApproveEventActivity, RejectEventActivity, and Custom Event Activity are displayed as Raise Event buttons.

- d) **DelayEventActivity:** You can set a timer after which you want an event to be performed.
- e) **Other Activities:** These activities define the actions to perform when an event occurred.

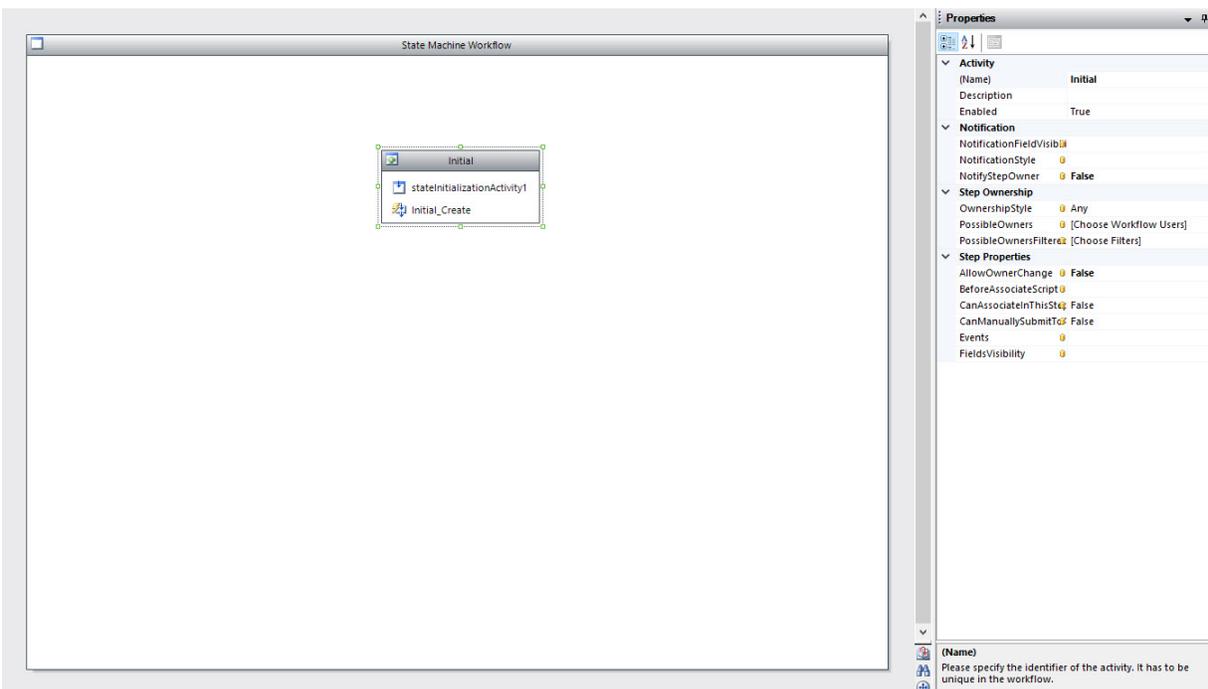
The following topics are covered in this section:

- [Step Activity](#)
- [Event-Driven Activity](#)
- [Activity](#)
- [Contextual Menu](#)

## StepActivity Properties

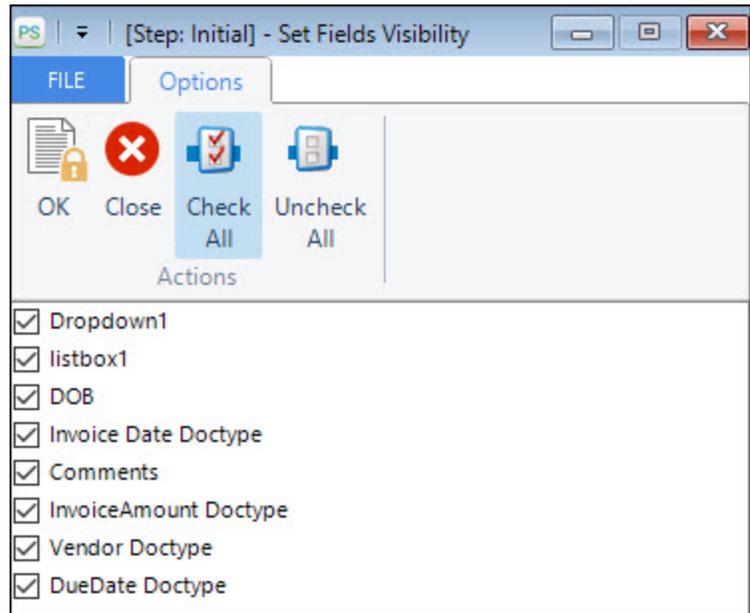
When you drag and drop the StepActivity from the ToolBox section into the Workflow Design area and on selecting the Step Activity, you will be able to view the Properties section in the right panel of the screen. The properties of StepActivity, InitialStepActivity, CompletedStepActivity, and ReviewStepActivity are as follows:

**Note:** Some properties apply only to their respective activities.



Property Name	Description
Name	Enter the name that you want to give to the step activity and is displayed as a raise event button name.
Description	Enter the description to describe the step activity.
Enabled	You can enable a step activity to allow it to perform an action by setting its property to "True" or disable by setting its property to "False".
NotificationFieldVisibility	The fields selected in this activity are displayed under the Field Names

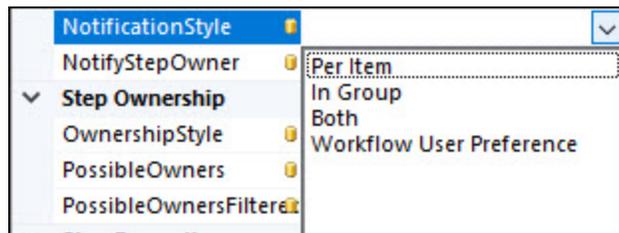
in PaperSave 7 style email notification-per item email.



NotificationStyle

You can select one of the following styles of notification from the drop-down list to send the email notification based on:

- Per Item
- In Group
- Both
- Workflow User Preference



NotifyStepOwner

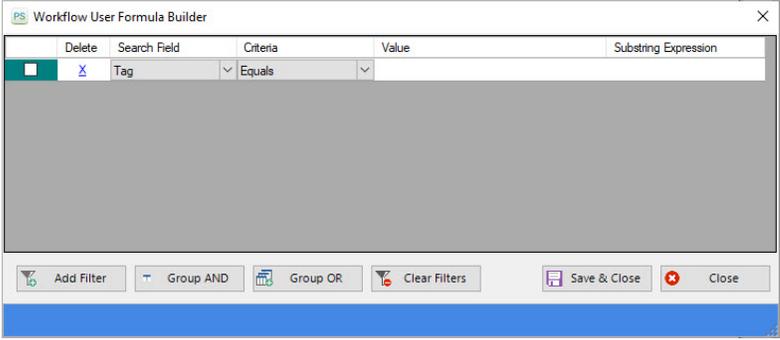
You must set this property as "True" to send the email notifications to the respective step owner.

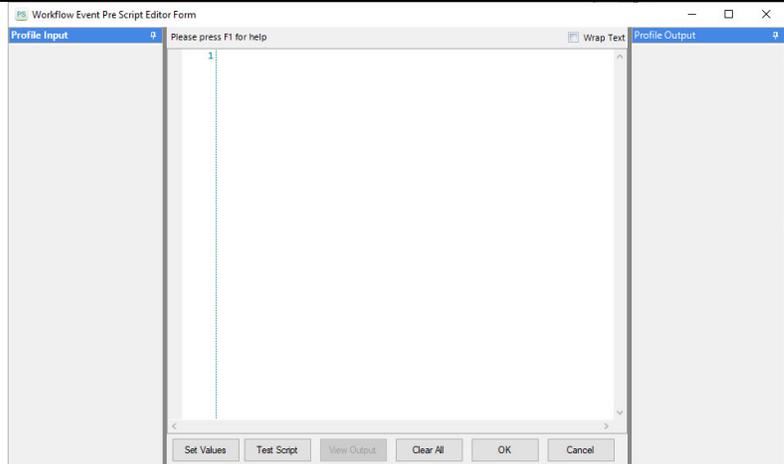
**Note:** The NotifyStepOwner field value is set as False by default.

OwnershipStyle

This option will allow you to select the ownership style from the drop-



PossibleOwnersFilteredbyTag	<p>This option will allow you to filter Workflow User using Workflow User Formula Builder. You need to click on Ellipsis's icon to get directed to the Workflow User Formula Builder screen. You can add the required filters and group them as per your requirement. Click on <b>Save &amp; Close</b> button to save the formula and exit the window.</p>  <p><b>Note:</b> The Workflow Users evaluated based on the filters set could be the owner of the current step if you select the Possible Owners Filtered by Tag option under the Ownership Style property.</p>
AllowOwnerChange	<p>By default, AllowOwnerChange is set as False. You can set the value as "True" to allow changing the step owner manually (applicable only for the Current Owner of the Workflow Item).</p> <p><b>Note:</b> You will be allowed to change values for AllowOwnerChange Property even without unpublishing a Workflow. A Workflow Admin or the Current Owner of the Workflow item will only be allowed to change the Owner of the selected Workflow Item.</p>
BeforeAssociateScript	<p>Click on the <b>Ellipsis</b> icon to write the script which will be executed before the associated event gets executed.</p>



**Note:** You cannot set the BeforeAssociateScript property if CanAssociateThisstep is set to False.

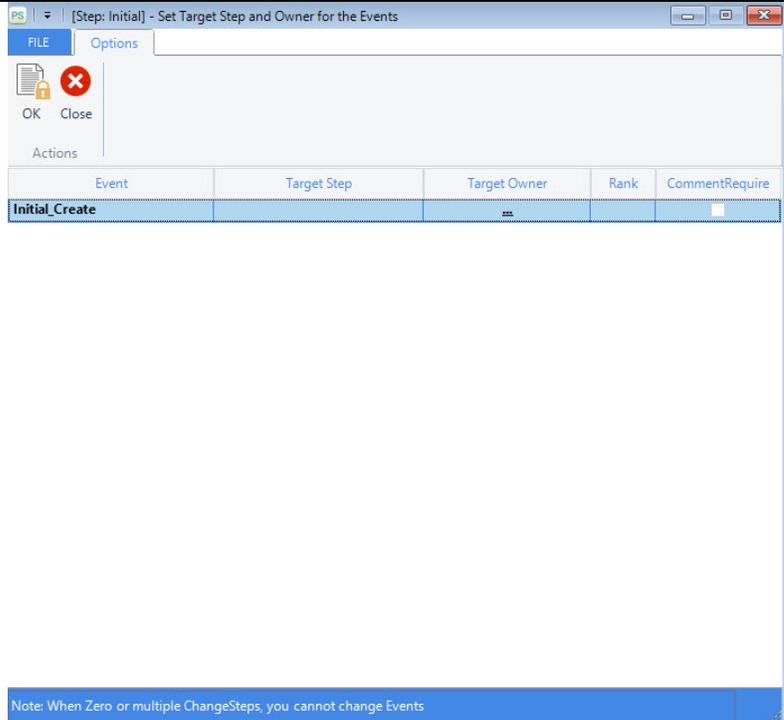
CanAssociatethisStep

If the CanAssociateInThisStep property is set to True then you can associate the respective Workflow Item to a record in the Host Application using Workflow Entry Viewer.

**Note:** You cannot set the CanbeAssociated property to True on the Initial or Completed Step.

Events

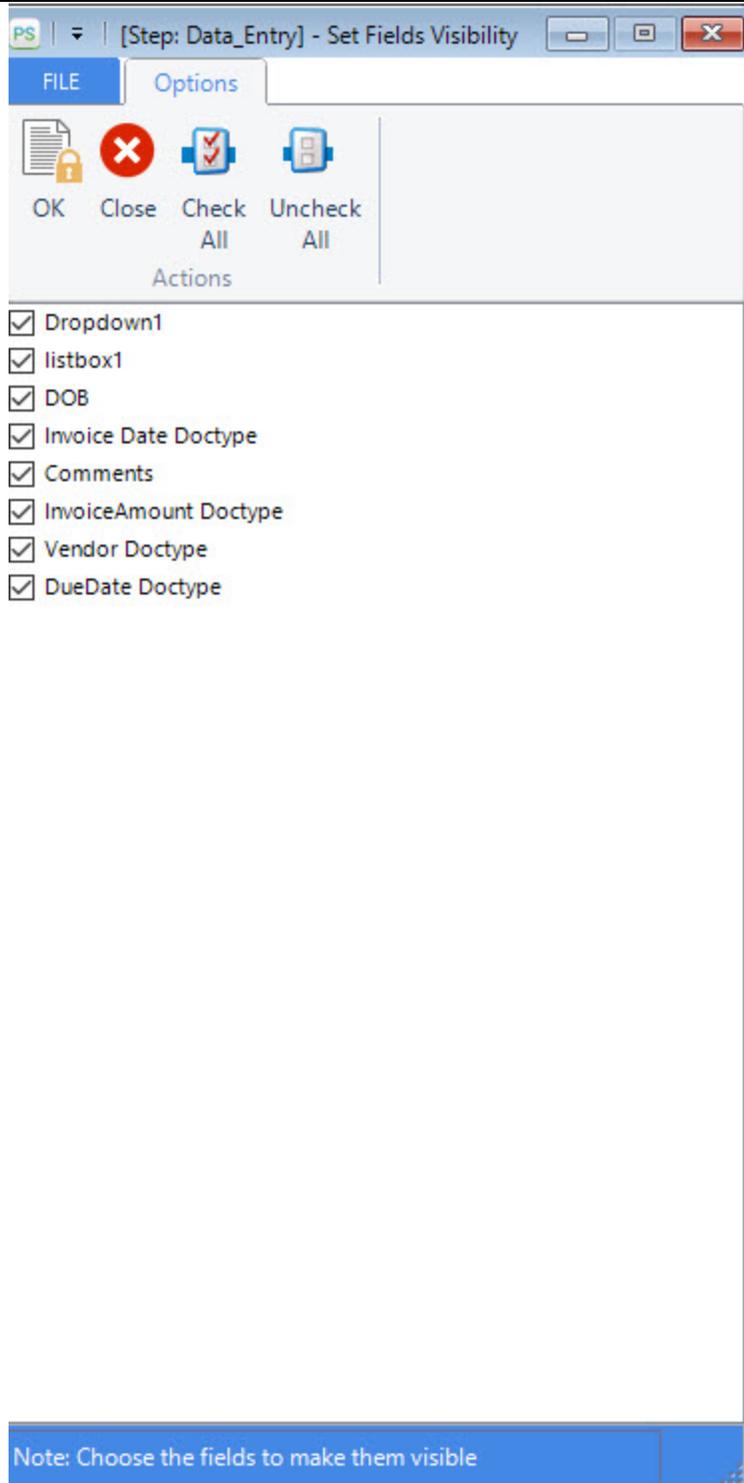
Click on the **Ellipsis** icon to get directed to the "SetTarget Step and Owner for the Events" screen. Here you can set the values for Target Step and Target Owner for the events that are added for that StepActivity. In the case of a Custom Event, you will be allowed to set Target Step and Target Owner if and only if the event consists of Change Step Activity. Moreover, you will be allowed to set rank for all the custom events. To save the desired changes, click on the **OK** button to save the changes and exit the screen.



**Note:** You can change the values for Target Step, Target Owner and Rank even without Unpublishing a Workflow.

### FieldsVisibility

Click on the Ellipsis icon to get directed to the Set Fields Visibility screen. This property allows you to define the fields that should be visible for a particular step. Ultimately, one can hide the irrelevant fields for a particular step by unchecking the field name from the list. It means that when a Workflow Item is in that step, you can view only those fields which are marked as Visible under Document Profile Panel. However, under Workflow Item Panel you can view all the fields that exist for the selected Workflow, no matter if the field is marked as hidden/visible for that step. Click on the **“OK”** button to save the details and exit the screen.



**Note:** You will be able to view both Profile Fields and Workflow Fields (if exists) in the Fields Visibility window.

CommentRequired	<p>If the CommentRequired property is set as True then you will be forced to add the comment while approving, rejecting, or executing any custom events from PaperSave Workflow, PaperSave Workflow Entry Viewer, PaperSave Workflow Item Review, PaperSave Web and PaperSave Mobile windows even if the prompt for comment from the respective windows is kept disabled.</p> <p><b>Note:</b> CommentRequired Property can also be set at Approve and Reject Event while designing a Workflow.</p>
RequiresSignature	<p>If the RequiresSignature property is set as True then you will be forced to apply the signature on a document. If this property is set to False, then the user can only view the Approve and Reject buttons.</p>
PostScript	<p>Script written at PostScript Event will be executed after the activity gets completed.</p>
PreScript	<p>Script written at PreScript Event will be executed before the activity gets started.</p>
DefaultTargetStep	<p>This is a mandatory property and it will be used in the case when the variable target step is not specified. This is a drop-down list and here you can specify the default target step that the item should move to.</p>
VariableTargetStep	<p>This is an optional property. Here you are allowed to enter the values and use profile or global variables to specify the target step value.</p>
TargetOwner	<p>Set TargetOwner property allows you to set the Target Owner for the next Target Step. For this, click on the Ellipsis icon to get directed to set Target Owner.</p> <p><b>Note:</b></p> <p>It is mandatory to set the TargetOwner property for a specific step or else you will not be allowed to compile/publish the Workflows. However, it is not required to set the Target Owner for the step if the Target Step is the Completed Step of the Workflow.</p> <p>It is not mandatory to set TargetOwner at the parent step if the</p>

	CanAssociateInThisStep property is set to True for the TargetStep.
CommentRequired	<p>If the CommentRequired property is set as True then you will be forced to add the comment while approving, rejecting, or executing any custom events from PaperSave Workflow, PaperSave Workflow Entry Viewer, PaperSave Workflow Item Review, PaperSave Web and PaperSave Mobile windows even if the prompt for comment from the respective windows is kept disabled.</p> <p><b>Note:</b> CommentRequired Property can also be set at Approve and Reject Event while designing a Workflow.</p>

## EventDriven Activity

The EventDrivenActivity activity contains a sequence of activities whose execution is started by an event. This event is subscribed to by the first child activity in the sequence, which must derive from the IEventActivity interface. The IEventActivity interface is implemented by activities that wait for external events, such as HandleExternalEventActivity and DelayActivity.

In a sequential workflow, you can have multiple IEventActivity-derived activities inside an EventDrivenActivity activity.

In a state machine workflow, you can add an EventDrivenActivity activity as an immediate child of a StateActivity activity, or to the workflow itself. However, when you use an EventDrivenActivity activity in a state machine workflow, you can only use a single activity derived from IEventActivity, and this activity must be the first activity in the state. This is because the state machine workflow model that Windows Workflow Foundation implements processes only one EventDrivenActivity activity at a time. For example, if multiple IEventActivity activities inside an EventDrivenActivity activity were able to run, you would have a situation where an

EventDrivenActivity activity becomes blocked while it waits for an IEventActivity that might never execute. This would prevent the state machine from being able to process any more messages.

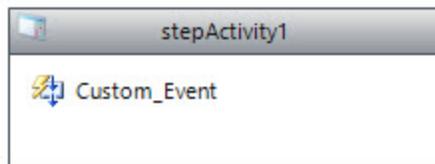
When you drag and drop the Event Driven Activity from the ToolBox section into the Workflow design area and on selecting the Event Driven Activity, you will be able to view the Properties section in the right panel of the screen.

## Custom Event Activity

The name of the activity itself indicates CustomEventActivity that allows you to create a custom event as per your requirement. Using this activity can create a Custom Event by providing "PostScript" and "PreScript" where you can specify the JavaScript which can be used to perform the operation on the Item before and after an action is taken on the Item.

To use the CustomEventActivity you need to set the following Properties:

1) Drag an appropriate activity into the design area, then drag and drop the CustomEventActivity under an event after which you want the CustomEventActivity as shown below:



2) As you drag and drop the custom event, properties pop-up appears, as shown in the below image.

Please Enter CustomEvents Properties

Name\*

Small Image

Large Image

Color\*

Description

Rank  To change, please go to the Rank property for this Event and click on ... button

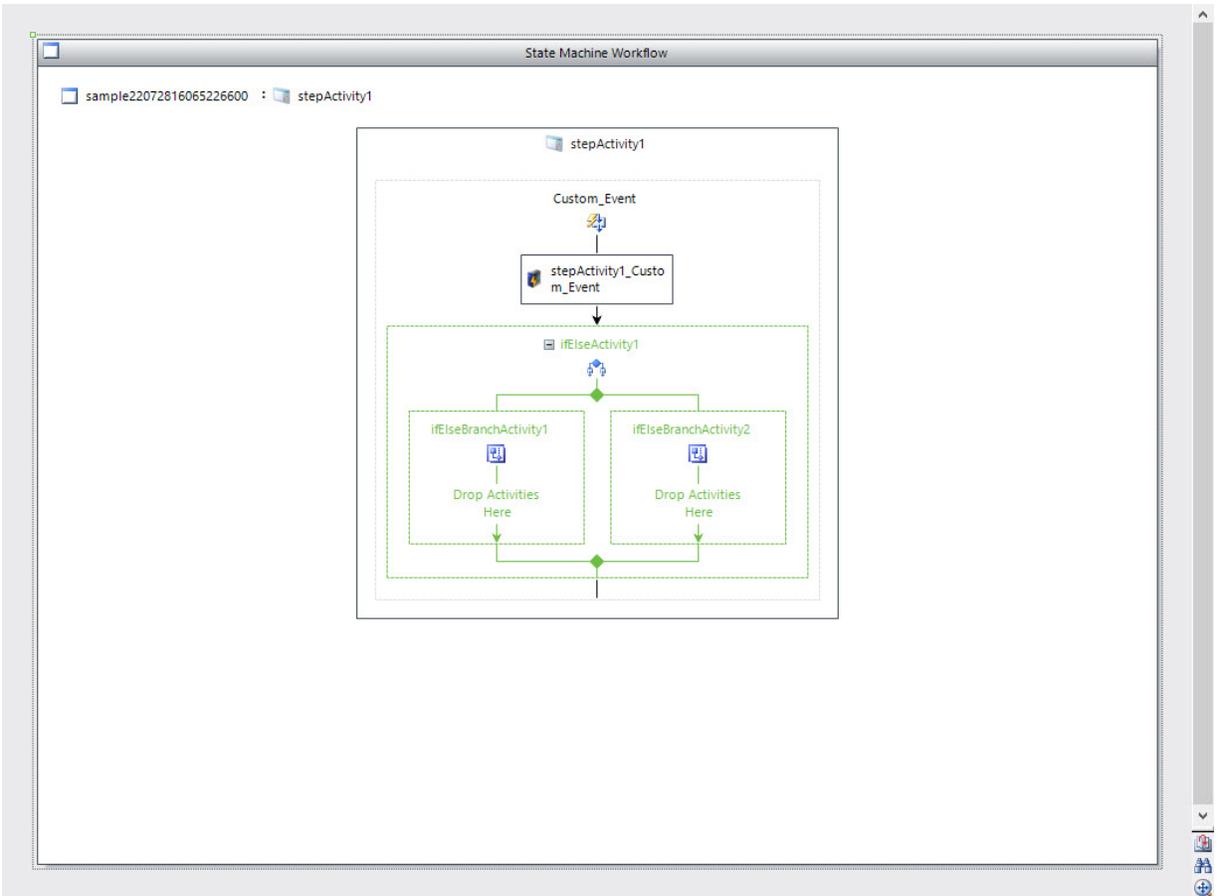
Note: You cannot cancel this window. If you wish to cancel adding the custom event then set a name, save, and then delete the custom event from the step.

3) Enter the following details:

Property Name	Description
Name*	Enter the name that you want to give to the custom event.
Small Image	It is used to display a smaller image for the event.
Large Image	It is used to display a large image for the event.
Color*	Select the color that you want to display for the event.
Description	Provide a description of the event.
Rank	It is used to specify the order of execution for the event.

4) Click on the **Save** button to save the details.

5) Now, when you add an activity for the custom event, then it will be displayed as below:



6) Similarly, you can edit the events that are already created by selecting the appropriate events from the design area and modifying their properties. You can also delete an event by selecting the appropriate event from the design area pane, right click and then selecting **Delete**.

The following topic is covered in this section:

- [EventDriven Activity Properties](#)

## Event Driven Activity Properties

When you drag and drop the Event Driven Activity from the ToolBox section into the Step Activity and on selecting the Event Driven Activity, you will be able to view the Properties section in the right panel of the

screen. The properties of ApproveEventActivity, RejectEventActivity, CustomEventActivity, CreateEventActivity, and DelayEventActivity are as follows:

**Note:** Some properties apply only to their respective event driven activities.

Property Name	Description
Name	Enter the name that you want to give to the event driven activity.
Description	Enter the description to describe the event driven activity.
Enabled	You can enable an event driven activity to allow it to perform an action by setting its property to "True" or disable it by setting its property to "False".
CommentRequired	If the CommentRequired property is set as True then you will be forced to add the comment while approving, rejecting, or executing any custom events from PaperSave Workflow, PaperSave Workflow Entry Viewer, PaperSave Workflow Item Review, PaperSave Web and PaperSave Mobile windows even if the prompt for comment from the respective windows is kept disabled.
ActivityDescription	Enter the description for the selected activity.
DisplayName	Enter the name that you want to display for the event.
EventColor	You can select the color of the event from the drop-down list.
LargeImageName	You can click on the <b>Ellipsis</b> icon to modify the Large Image Name.
Rank	Rank of the event will be assigned as per its order of dragging. You are allowed to change the rank by clicking on the <b>Ellipsis</b> icon.
SmallImageName	You can click on the <b>Ellipsis</b> icon to select the Small Image Name.
PostScript	Script written at PostScript Event will be executed after the activity gets completed.

PreScript	Script written at PreScript Event will be executed before the activity gets started.
Recurring	Setting this property as "False" would fire the activity once, otherwise, it would fire as many times as the condition proves to be "True".
TimeoutDuration	The duration of time after which you want the activity to fire. The number of days should precede the time (HH:MM:SS).
Email ID	In case of failure, the notification can be sent to the Email ID provided here.
SuppressHistory	It is used to limit the redundant log of the workflow history.

## Activity

When you drag and drop the Activity from the ToolBox section and on selecting the Activity, you will be able to view the Properties section in the right panel of the screen.

**Note:** Some activity properties are applicable for their respective activities.

The following topics are covered in this section:

- [State Initialization Activity](#)
- [State Finalization Activity](#)
- [Change Step Activity](#)
- [Types of Target Owners](#)
- [Auto Entry Activity](#)
- [If Else Activity](#)
- [While Activity](#)

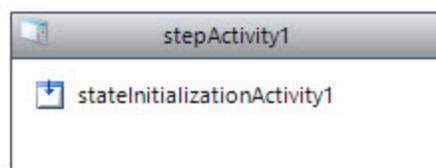
- [Sequence Activity](#)
- [Script Activity](#)
- [Workflow History Stamp Activity](#)
- [Send Email Activity](#)
- [Associate Document Activity](#)
- [Throw Activity](#)
- [Fault Handler Activity](#)

## State Initialization Activity

The State Initialization Activity is a sequence activity that contains child activities. When the State machine transitions to a state, the children inside the initialization activity will execute. There can only have one initialization activity per state. Once the activity is dropped inside a state, double-click to edit the children.

The StateInitializationActivity functions much like a typical SequenceActivity, except that it is used as the first activity in a state in a StateMachineWorkflowActivity.

You can simply drag and drop the StateInitializationActivity within any State Activity of the Workflow, as displayed below.



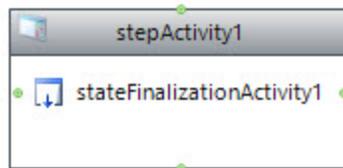
When you drag and drop the State Initialization Activity from the ToolBox section into the State Activity and on selecting the Activity, you will be able to view the Properties section in the right panel of the screen. The properties are as follows:

Property Name	Description
Name	Enter the name that you want to give to the activity.
Description	Enter the description to describe the activity.
Enabled	You can enable an activity to allow it to perform an action by setting its property to "True" or disable it by setting its property to "False".

## State Finalization Activity

The StateFinalizationActivity is used in a StateActivity as a container for child activities that are executed when leaving the state activity. A StateActivity can have at most one StateFinalizationActivity. Unlike an EventDrivenActivity, which can also be a StateActivity child, the StateFinalizationActivity does not have to respond to events. It always executes when a StateActivity exits.

You can simply drag and drop StateFinalizationActivity within a State Activity of a Workflow, as displayed below.



When you drag and drop the State Finalization Activity from the ToolBox section into the State Activity and on selecting the Activity, you will be able to view the Properties section in the right panel of the screen. The properties are as follows:

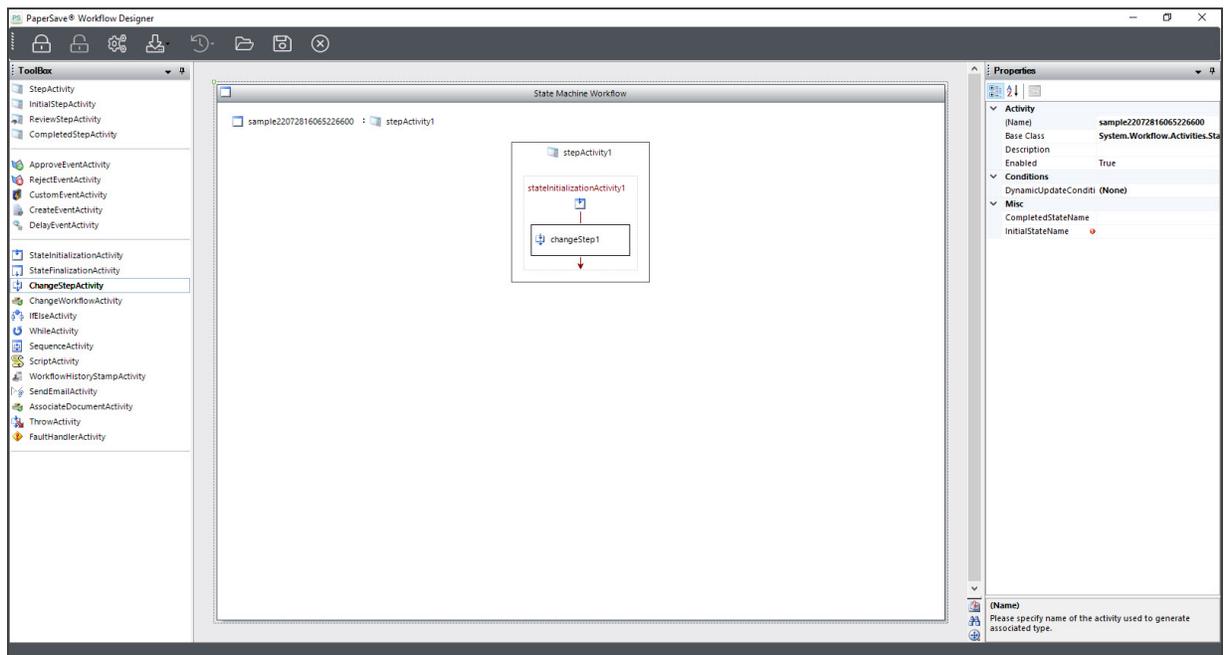
Property Name	Description
Name	Enter the name that you want to give to the activity.
Description	Enter the description to describe the activity.

Enabled

You can enable an activity to allow it to perform an action by setting its property to "True" or disable by setting its property to "False".

## Change Step Activity

Change Step Activity is used to change the step of the activity. You can view a new Step Activity named Change Step Activity added under Toolbox Section. You can drag and drop the change step activity, as displayed in the below screen. You can set the Properties for Change Step Activity from the right panel of the screen.



The properties are as follows:

Property Name	Description
DefaultTargetStep	This is a mandatory property, and it will be used in the case when the variable target step is not specified. This is a drop-down list and here you can specify the default target step that the item should move to.
VariableTargetStep	This is an optional property. Here you are allowed to enter the values and use the profile or global variables to specify the target step value.
TargetOwner	This is a mandatory property. It is used to specify the owner of the Workflow item in the target step.

The following topic is covered in this section:

- [Types of Target Owners](#)

## Types of Target Owners

Target Owner can be set from the below-mentioned Activities:

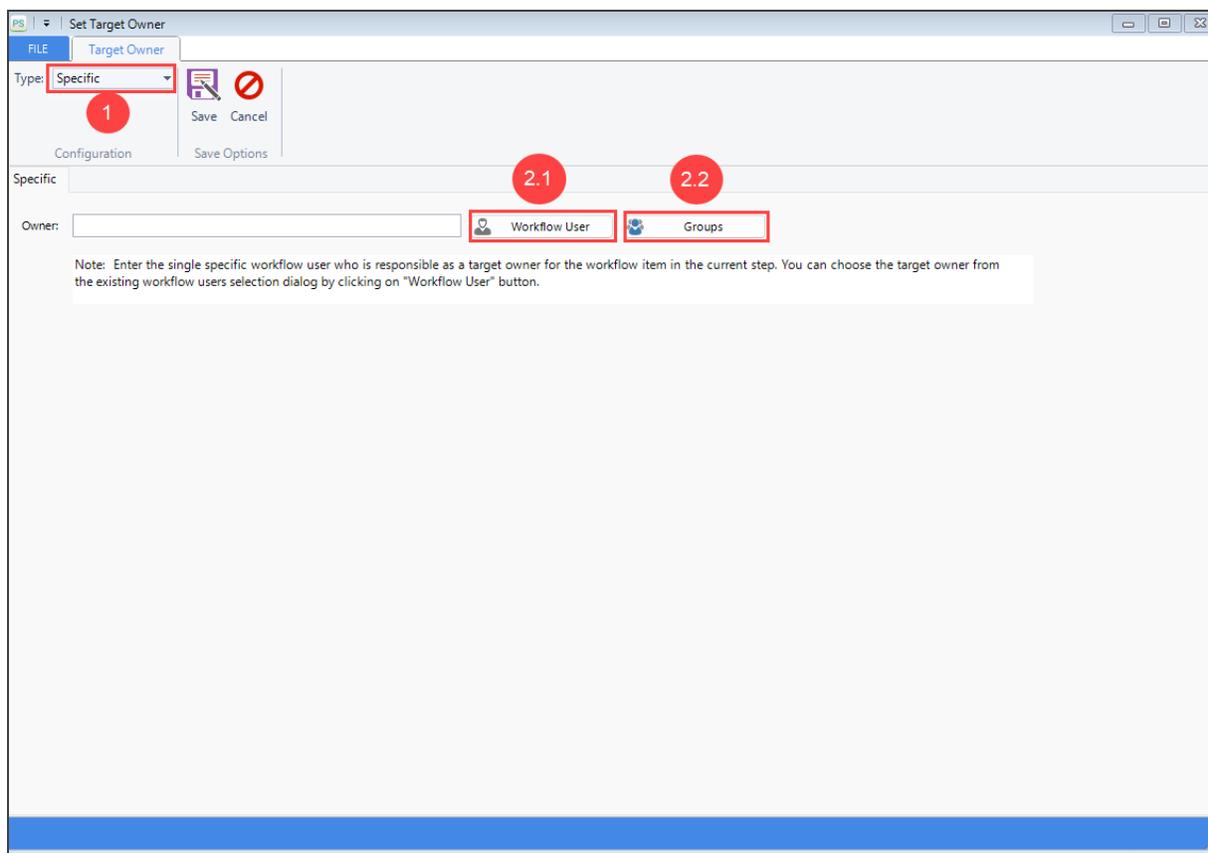
- 1) [ChangeWorkflowActivity](#)
- 2) [ChangeStepActivity](#)
- 3) [AutoEntryActivityForStep](#)

There are three types of options available to set Target Owner viz. Specific, Condition, and Variable.

**Specific:** Specific type allows you to set a specific type of Target Owner, where you can select either Workflow Users or Groups as the target owner.

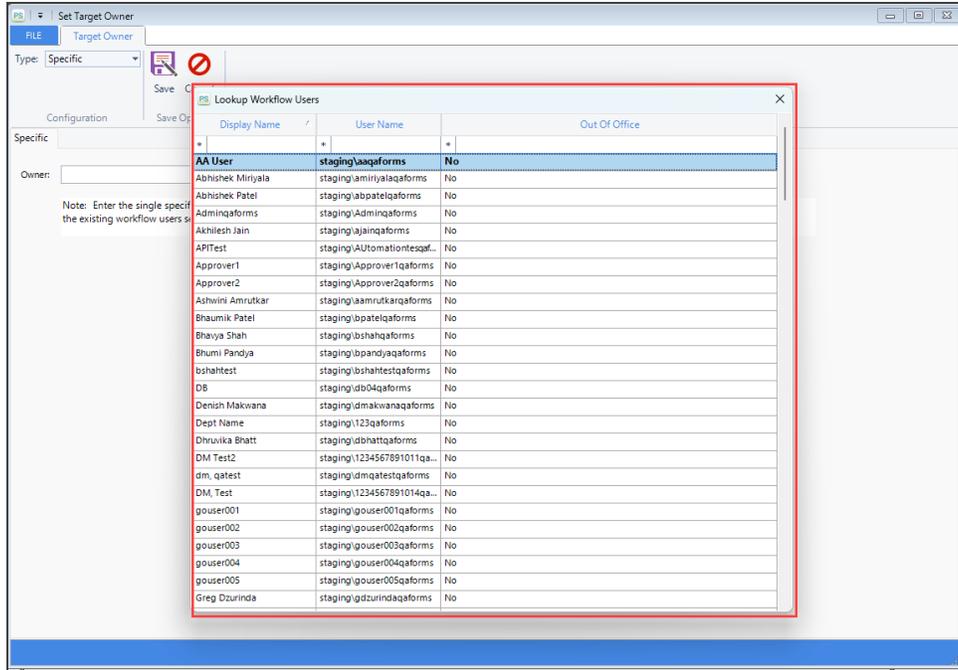
**1) Type:** Select the type of Target Owner as Specific from the drop-down list.

**2)** Once the Type is selected, you can choose either a Workflow User or Groups to set as the target owner.

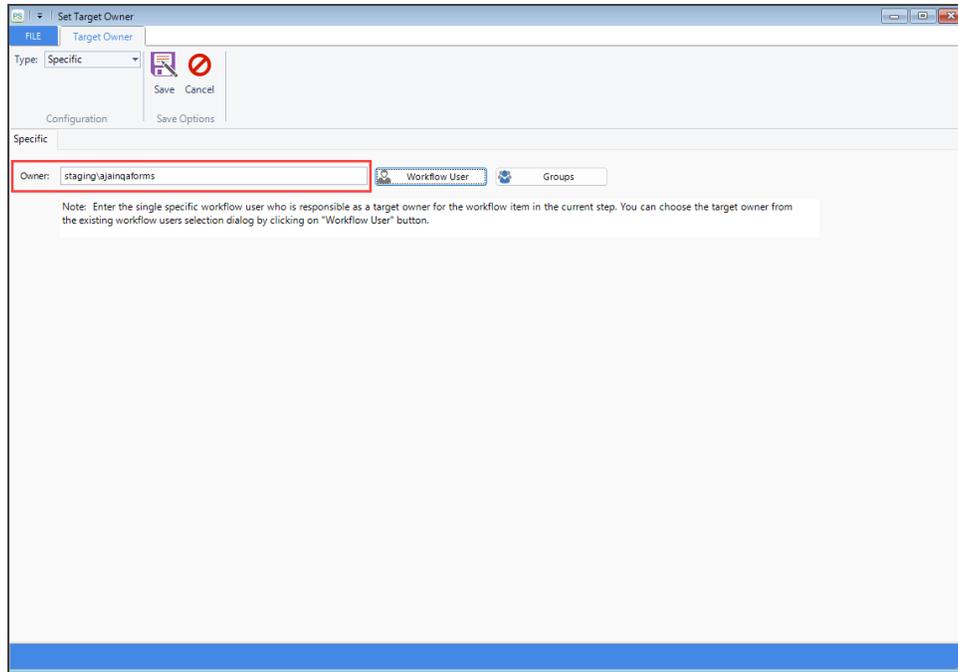


**2.1) Workflow User:** Select Workflow User, if you want to set the single user as a target owner.

**2.1.1) Lookup Workflow Users:** As you click on the Workflow User button, the Lookup for the Workflow Users appears on the screen. You can view the list of Workflow Users that have been created from the User and Group Management section. Select the user from the list as per your requirement.

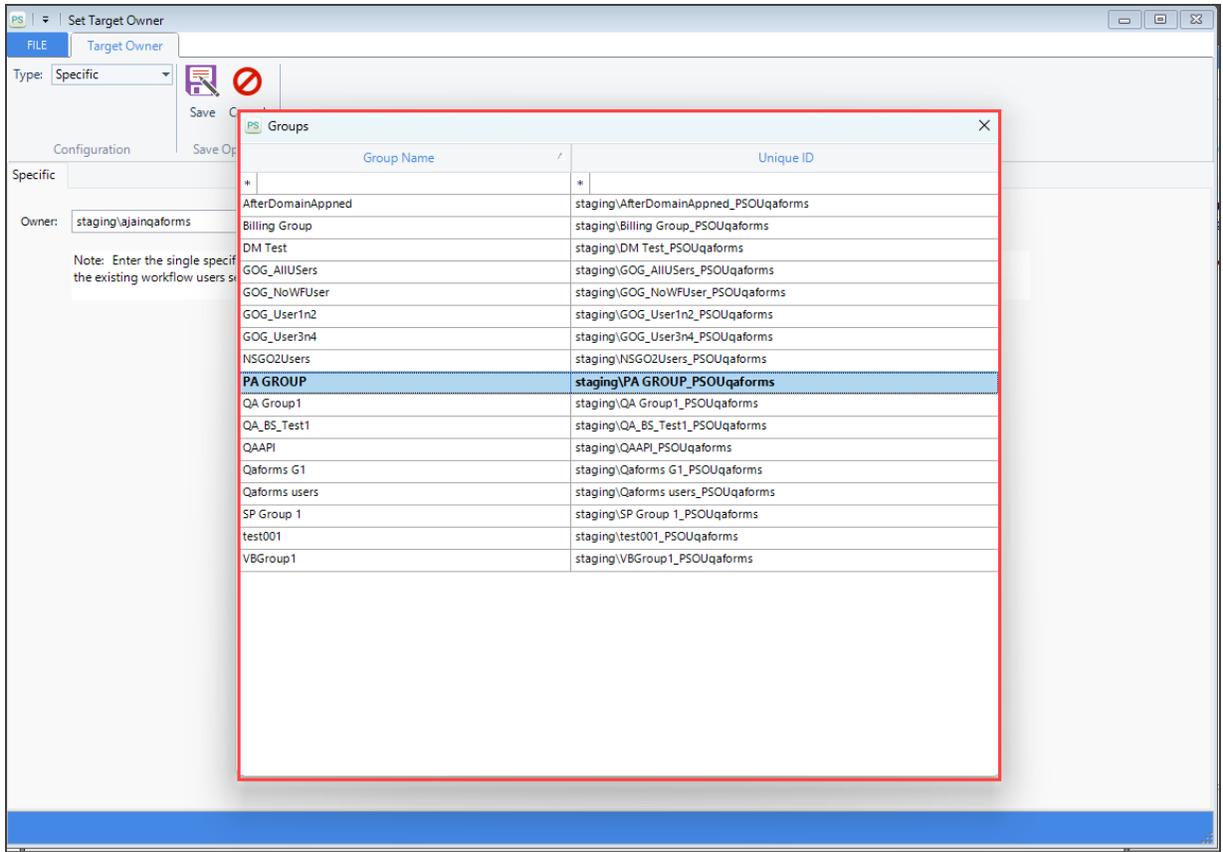


**2.1.2) Owner:** You can view the selected User from the Lookup which gets displayed in the available textbox.

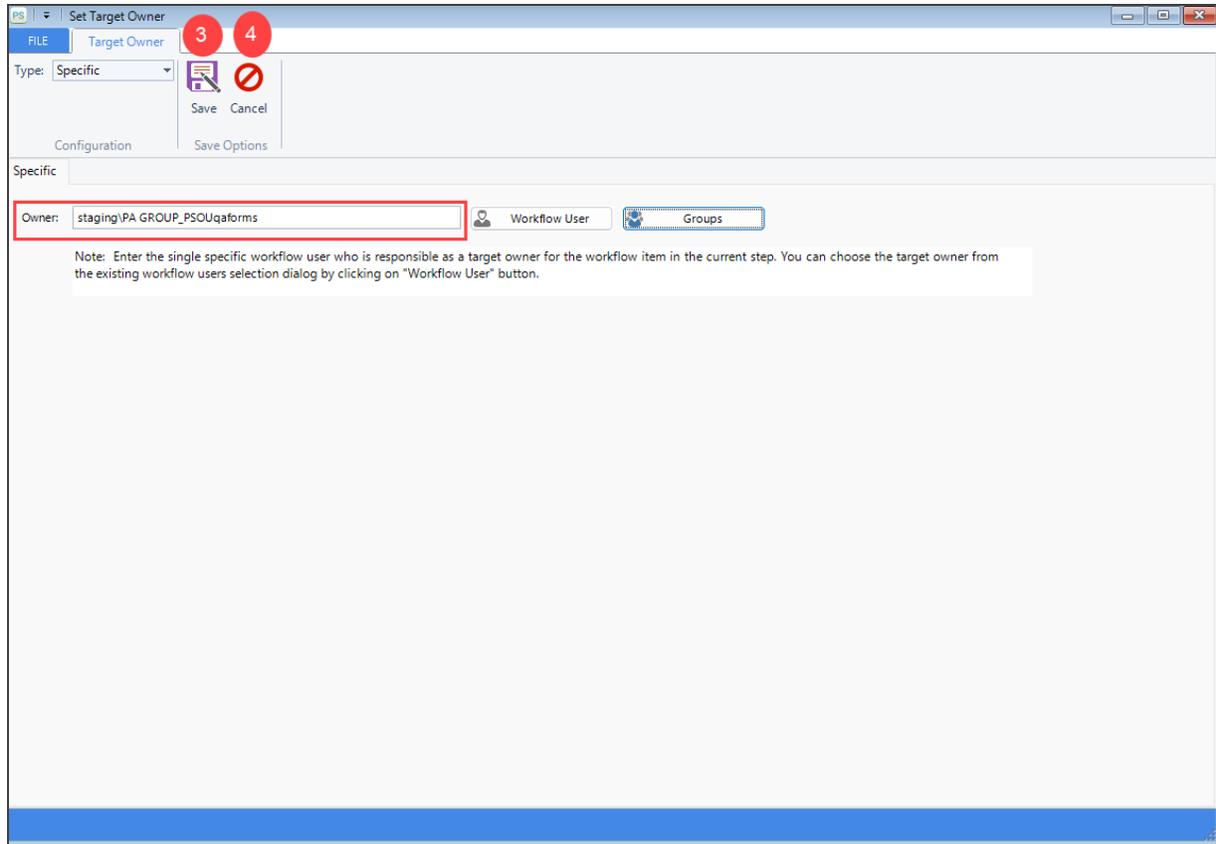


**2.2) Groups:** Select Groups, if you want to set the group as a target owner.

**2.2.1) Lookup Groups:** As you click on the Group button, the lookup displays the list of group names with the Unique ID present in their directory. Select the group from the list as per your requirement.



**2.2.2) Owner:** You can view the selected Group from the Lookup which gets displayed in the available textbox.



**3) Save:** Click on the Save option to save the Target Owner.

**4) Cancel:** Click on the Cancel option to cancel the action and exit the screen.

## Condition

You can use the Condition type of Target Owner to define multiple conditions to set Target Owner.

**Target Owner Options:** Following are the different options available under the Condition Type of Target Owner:

- **Type:** Select the type of Target Owner as Condition from the drop-down list.
- **Add:** You can click on the **Add** option to add a new condition.

- **Edit:** You can click on the **Edit** option to edit the selected condition.
- **Save:** You can click on the **Save** option to save the newly added condition.

**Note:** Once you click on the **Edit** option, caption of the Save button will get changed to Update. You can click on the Update option to update the selected condition.

**Delete:** You can click on the **Delete** option to delete the selected condition.

**Cancel:** You can click on the **Cancel** option to cancel the current action and get back to the previous action.

**Select All Active:** Select All Active option will allow you to select all the active Condition Types.

**Select All Inactive:** Select All Inactive option will allow you to select all the inactive Condition Types.

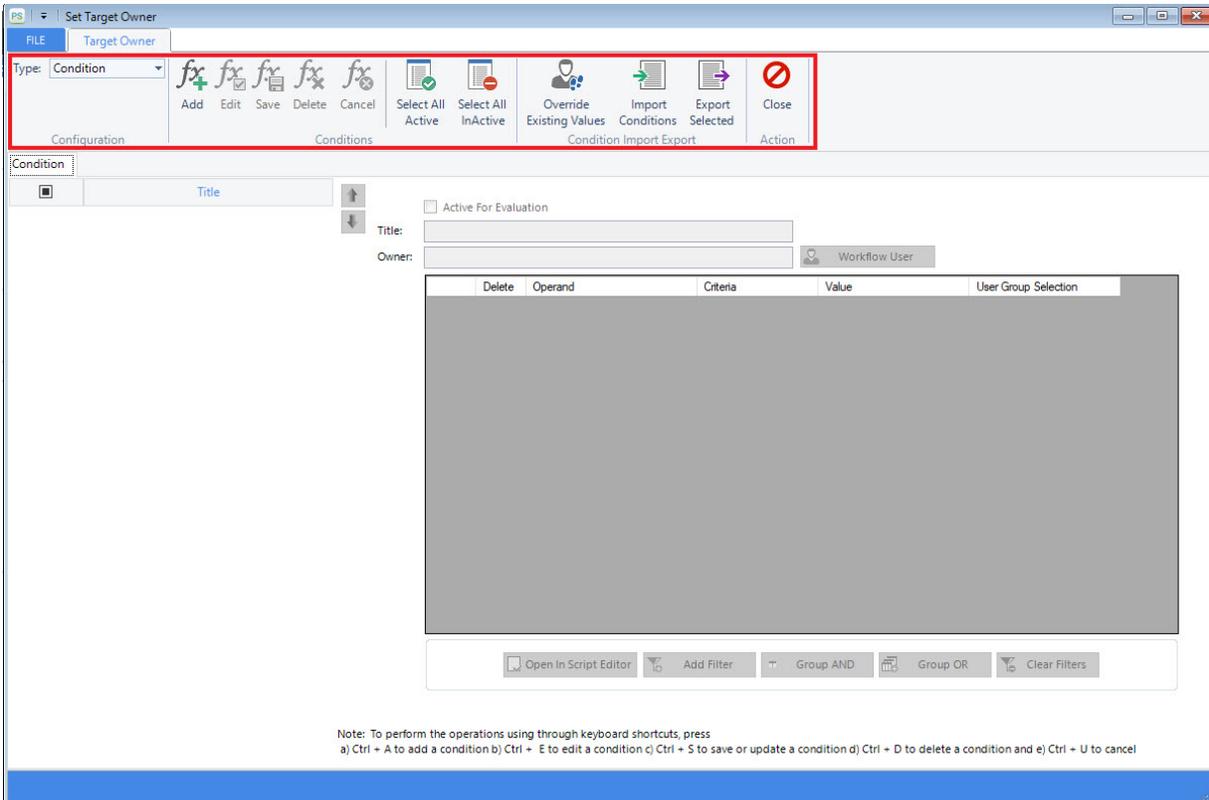
**Override Existing Values:** You can click on Override Existing Values to override the existing condition while importing a file.

**Note:** To override the existing condition while importing a file, you need to make sure that you click on the **Override Existing Values** option before clicking on the Import option.

**Import Conditions:** ImportConditions option is used to import a file with extension .pscnd that has been saved on your system.

**Export Selected:** ExportSelected option will save the selected Condition Type in the .pscnd file on your system.

**Close:** Close option will close and exit the screen.



## Adding a Condition:

To add a new condition, you need to follow below-given steps:

- 1) **Add:** First, click on **Add** button to add a new condition.
- 2) **Active for Evaluation:** If you want to mark the newly added condition as active then select Active For Evaluation option.

**Note:** The condition that has been marked as active will be displayed in Green color and the ones that are not marked as active will be displayed in Red color on the left panel of the screen.

- 3) **Title:** Type the title of the Condition in the available textbox.

4) **Workflow User:** Click on **Workflow User** to select the Workflow User from the Lookup Workflow User Screen.

Now there are two ways of adding a condition, first is by writing a script in Script Editor Window by clicking on **Open In Script Editor** option and the second is by adding the filters by clicking on **Add Filter** option.

5) **Add Filter:** Click on **Add Filter** option to add the filters for adding a new condition. Thereafter you can either select Profile Fields or General Fields from Operand drop-down list and then set the other filters like Criteria, Value and User Group Selection.

6) **Group AND:** After adding all the required filters and selecting the required values, you are allowed to group the condition. Group AND option will group the selected condition into AND as displayed in the below screen.

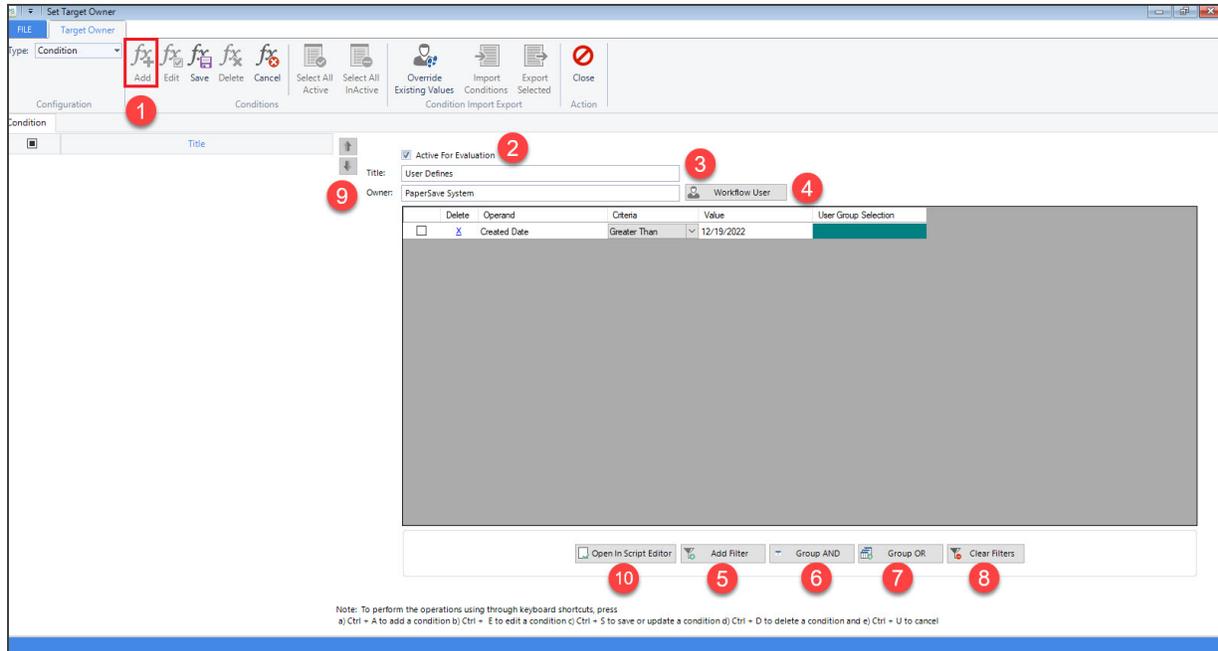
7) **Group OR:** Group OR option will group the selected condition into OR. You are also allowed to group a bunch of grouped conditions into one group by selecting them using the Ctrl key as displayed in the below screen.

8) **Clear Filters:** Clear Filters option is used to clear all the filters in a single click.

9) **Arrows: Up** and **Down** Arrow icons are used to set the rank of the conditions.

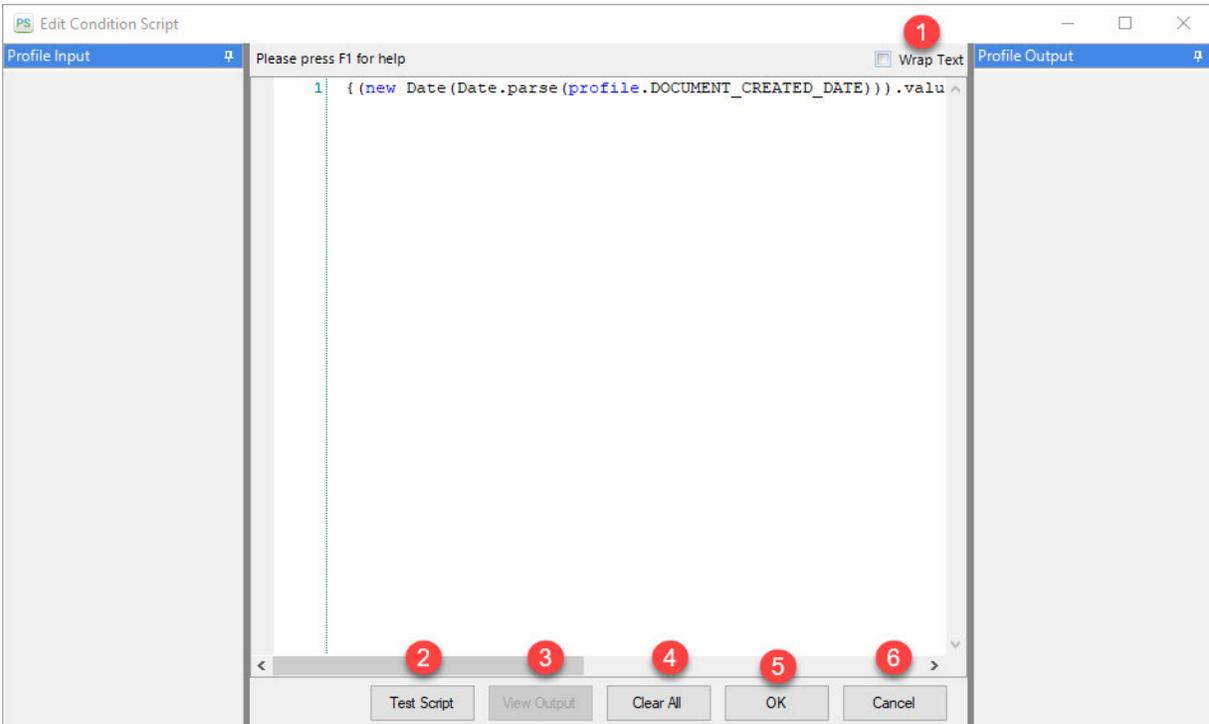
**Note:** Conditions will be evaluated in the order of rank until it evaluates the conditions to be true.

10) **Open in Script Editor:** To write the script, you need to click on the **Open in Script Editor** option.



As you click on the Open In Script Editor option, Edit Condition Script Screen will appear, as displayed below.

- 1) **Wrap Text:** Select Wrap Text option, to wrap the text written in the middle panel.
- 2) **Test Script:** To test the script, click on the **Test Script** option.
- 3) **View Output:** To view the output of the script, click on the **View Output** option.
- 4) **Clear All:** Clear All option will clear the entire script.
- 5) **Ok:** Click on the **Ok** option to save the script and exit the screen.
- 6) **Cancel:** Click on the **Cancel** option to close and exit the screen.



## Variable

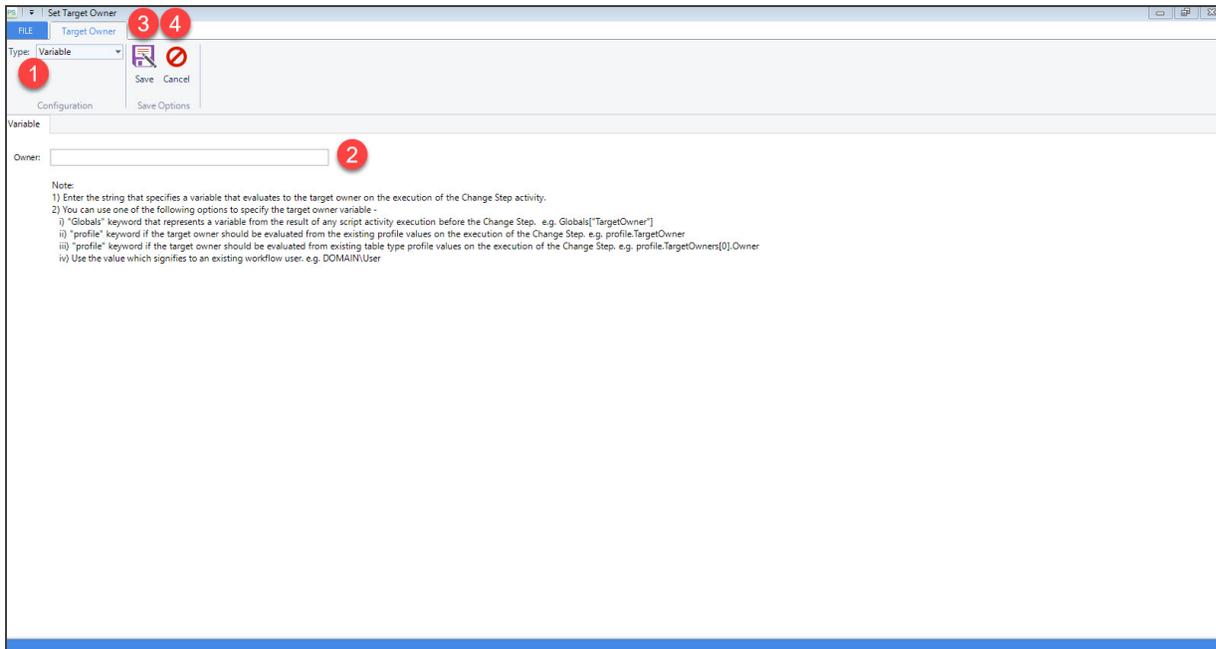
- 1) **Type:** Select the type of Target Owner as Variable from the drop-down list.
- 2) **Owner:** Here you can either enter the string that specifies a variable or use the Globals or Profile keyword in the available textbox. The variable will be evaluated at the time of execution of the activity and the value of variable will be used as a target owner.

**Example:** `Globals.add("GrpName","PS\\Product_Management");`

In the above example, "GrpName" is the global variable and "PS\\Product\_Management" is the name of the user group

- 3) **Save:** Click on the **Save** option to save the target owner.

4) **Cancel:** Click on the **Cancel** option to cancel the action and exit the screen.



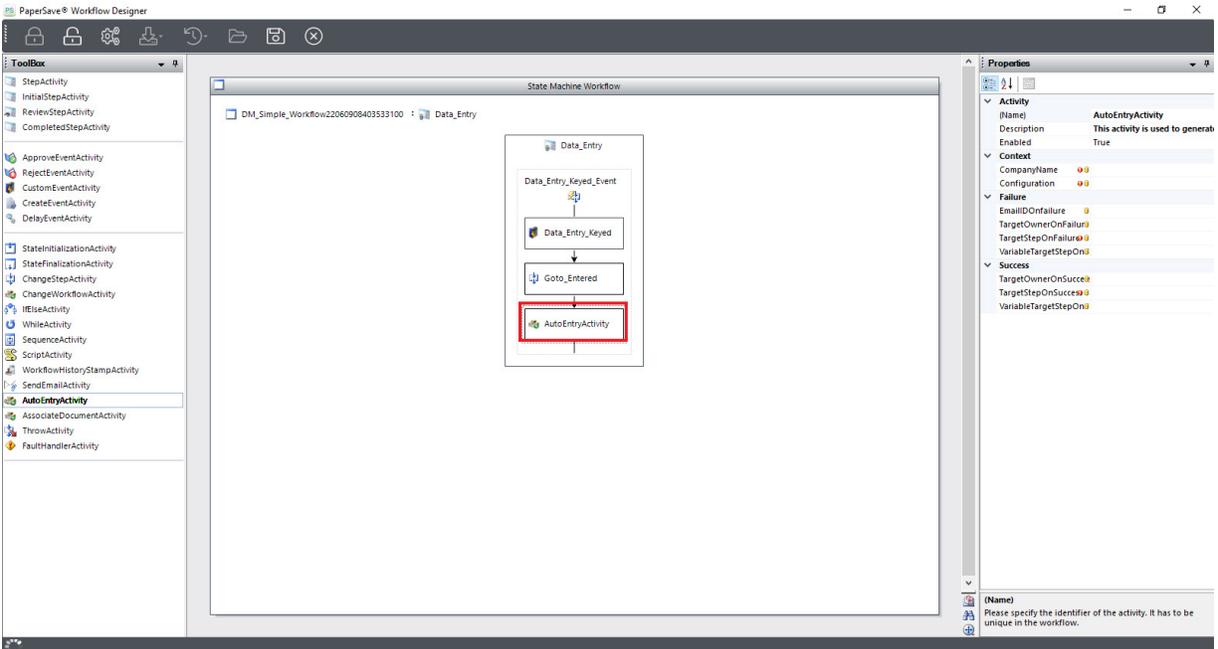
## Auto Entry Activity

### Writing an AutoEntryActivity

AutoEntryActivity is defined in the Workflow Design and works the same as AutoEntry Wizard but without any client interaction. This activity performs automatically when any document moves from an AutoEntryActivity defined workflow queue only to a Host Record.

1) From the design section, as mentioned before in "Designing a Workflow," drag the AutoEntryActivity from the toolbox and place it under an event after which you want to have an IF/Else condition, as shown below:

2) The Properties of AutoEntryActivity will appear, as shown below:



3) Enter the details for the various fields under the Properties panel.

### Context:

- **CompanyName:** Click on **Bind** to bind CompanyName to an activity's property or else you are also allowed to write hardcoded Company Name in the available textbox or you can store the company's name in a Globals variable and access it here with the syntax as **Globals["NameofGlobalVariable"]**
- **Configuration:** Click on **Bind** to provide the configuration of the activity in this box as shown below:

AutoEntry Activity Configuration window will appear.

- **Batch Name:** Enter Batch Name in the available textbox.
- **Batch Posting Date:** Select the Batch Posting Date. By default, current date will be displayed.
- **Batch Checkbook ID:** Enter Batch Checkbook ID.
- **Account Number:** Enter the Account Number in the available textbox.

## Failure:

- **EmailIDOnFailure:** Click on **Bind** to bind EmailIDOnFailure to an activity's property.
- **TargetOwnerOnFailure:** Click on **Bind** to get set Target Owner. Click [here](#) to know more about Target Owner.
- **TargetStepOnFailure:** Select target step from the drop-down list.
- **VariableTargetStepOnFailure:** Click on **Bind** or enter the variable target step in this box. The Bind 'VariableTargetStepOnFailure' to an activity's property dialog box will open. Select the appropriate Property with which the 'VariableTargetStepOnFailure' is to be bound as shown below:

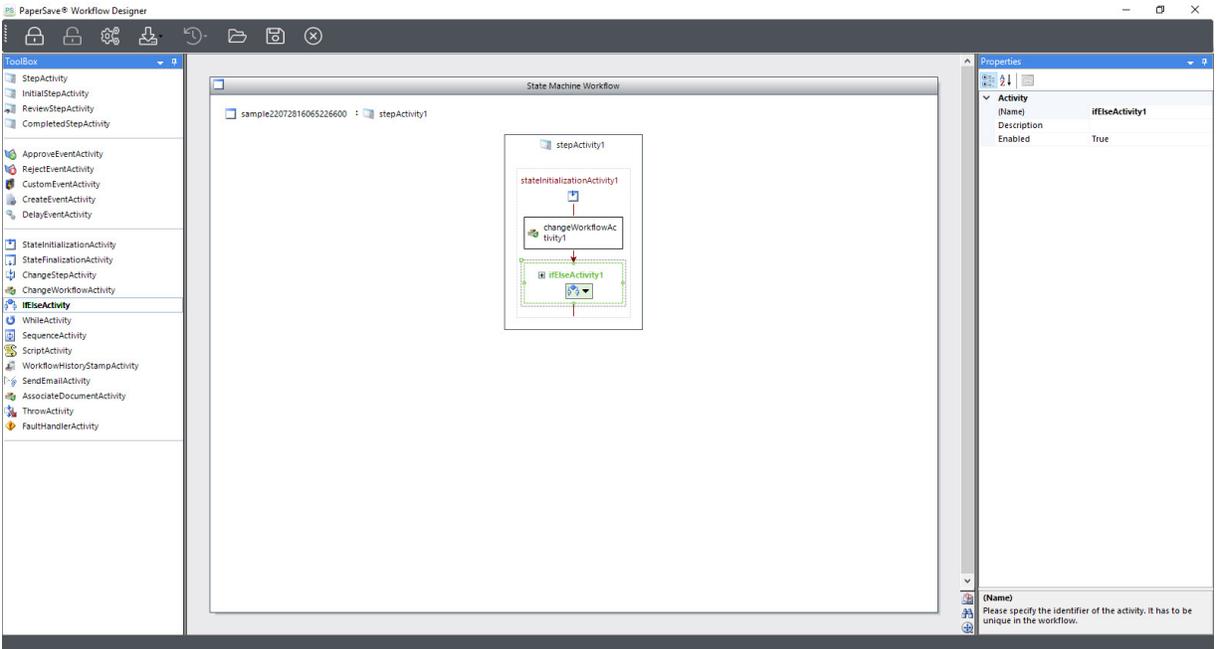
## Success:

- **TargetOwnerOnSuccess:** Click on **Bind** to set Target Owner. Click [here](#) to know more about Target Owner.
- **TargetStepOnSuccess:** Select target step from the drop down list.
- **VariableTargetStepOnSuccess:** Click on **Bind** or enter the variable target state in this box. The **Bind** 'VariableTargetStepOnSuccess' to an activity's property dialog box will open. Select the appropriate property with which the 'VariableTargetStepOnSuccess' is to be bound as shown below:

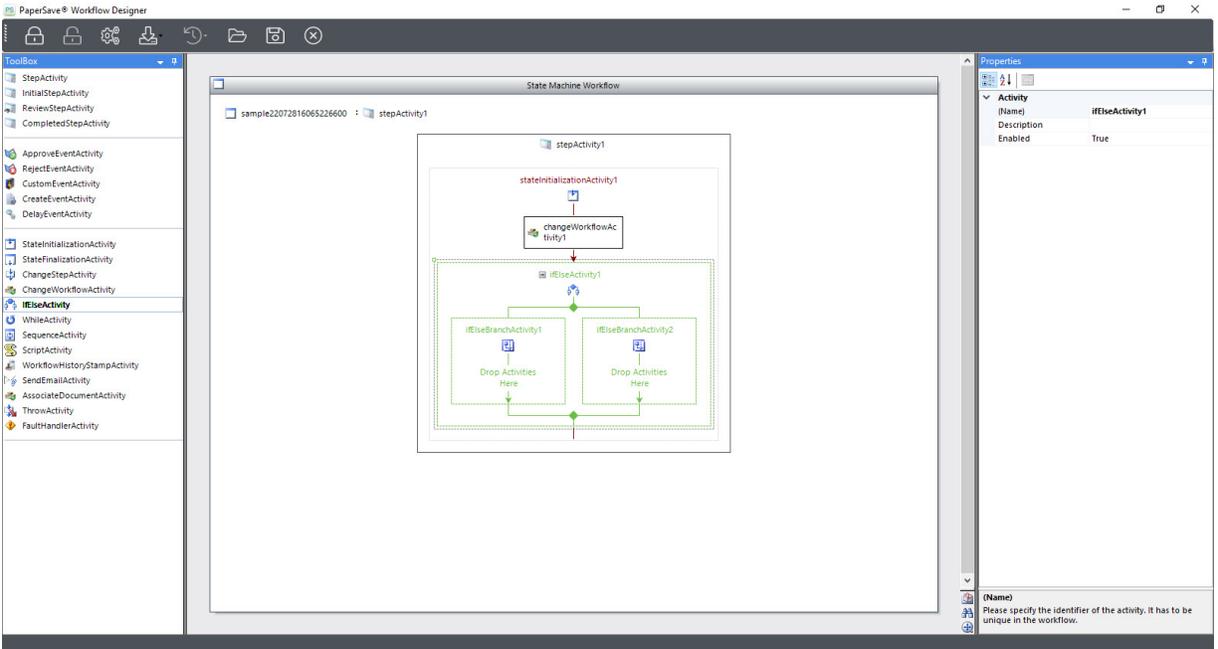
## If Else Activity

To write an IF/Else condition, follow the steps below:

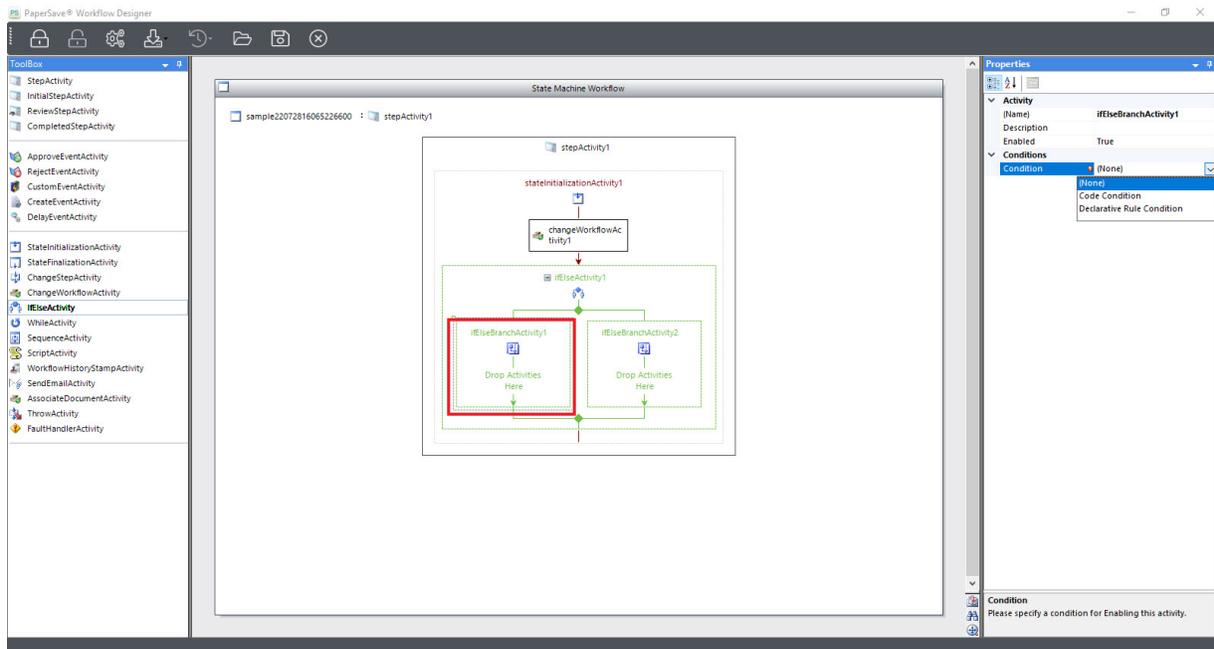
1) Drag the IfElseActivity from the toolbox and place it under an event after which you want to have an IF/Else condition, as shown below:



2) Click on ifElseActivity1 and provide the Name, Description, and value for Enabled from the Properties window.

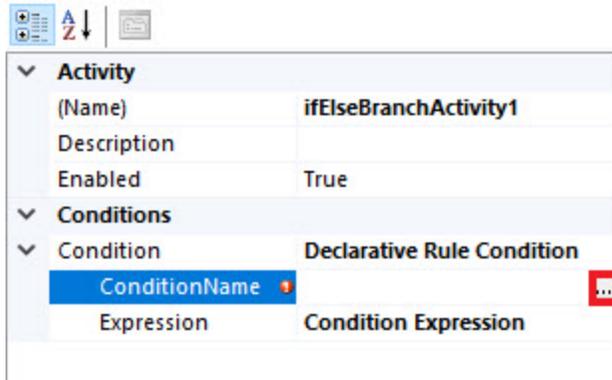


3) Click on the left of the "IfElse" branch activity as shown below by an arrow and select "Declarative Rule Condition" or "Code Condition" for the Condition Field under the Properties window.



For "Declarative Rule Condition":

4) Expand the "Condition" tree in the Properties window and provide a "ConditionName" by clicking on the button as shown below by an arrow:

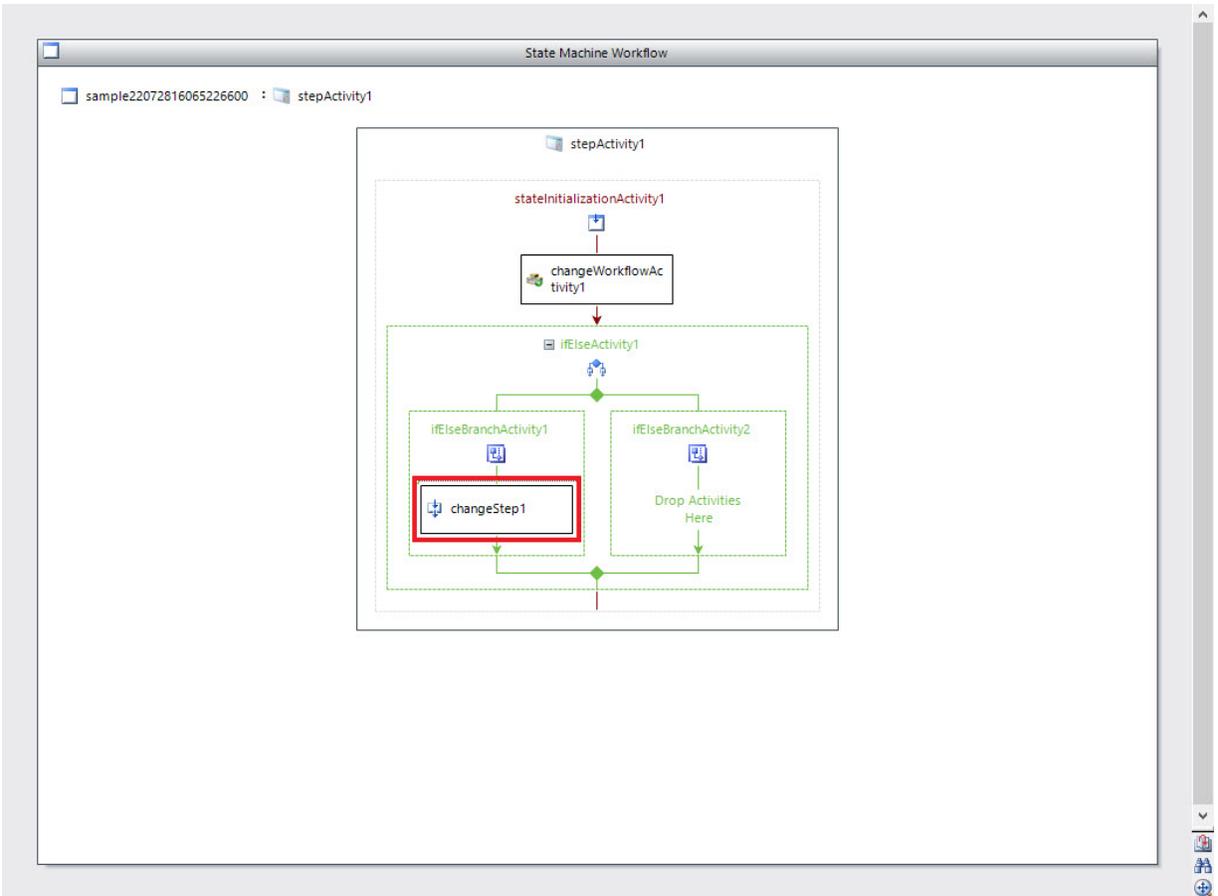


5) The Select Condition dialog box will open. Click on the **New** option.

6) The Rule Condition Editor dialog box will open, type in the Condition and click on the **OK** button.

**Note:** The word that is highlighted in the above image in the "Rule Condition Editor" can be a Profile Field of the current Document Type or it can be a PaperSave Variable.

7) Drag any of the Step Activity under that Condition as shown below:



8) Repeat steps 5 and 6 for the ifElse condition.

If "Code Condition" is selected as the Condition Type, then you need to write the code you want to be evaluated in the Condition box and then add a Step Activity under that condition.

Activity	
(Name)	<b>ifElseBranchActivity1</b>
Description	
Enabled	True
Conditions	
Condition	Code Condition
Condition	<input type="text"/> <span>⬇</span>

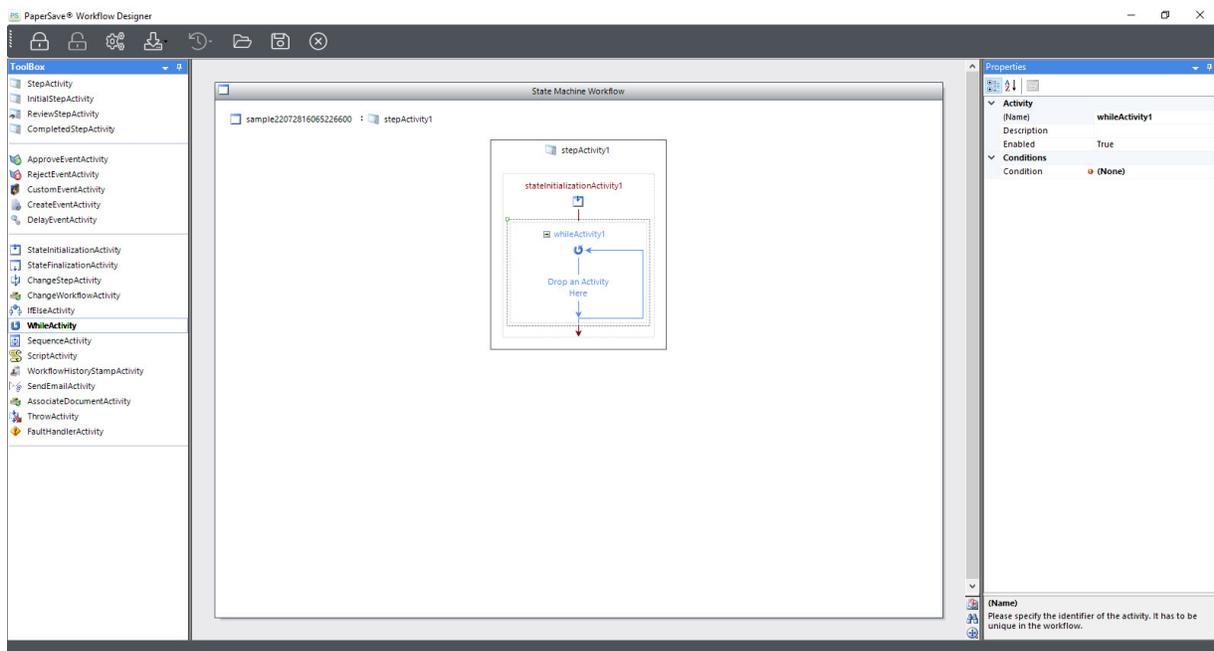
You can also use the profile fields by using the following syntax:

profile.profilefieldname

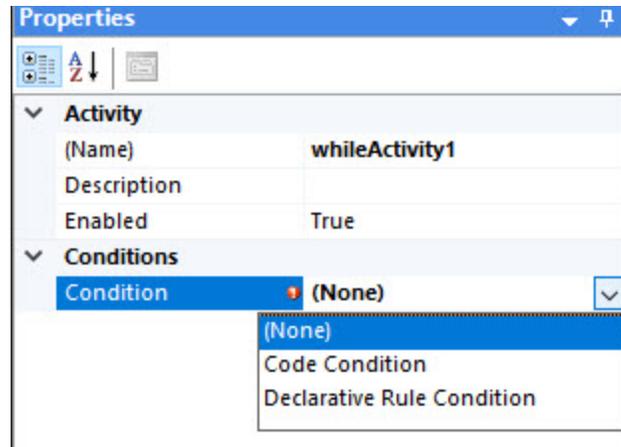
## While Activity

While Activity is used to execute an action in a loop by writing the script accordingly.

1) Drag and Drop WhileActivity within an Event Activity, For Example, CustomEventActivity as below:

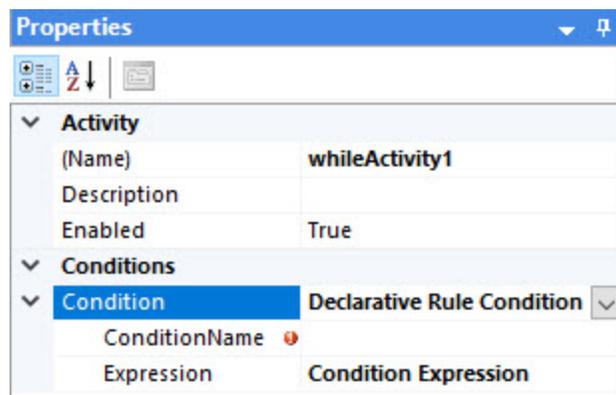


2) Click on WhileActivity and you can view the Properties section in the right panel of the screen, as displayed below. You can define a condition using two ways; Code Condition and Declarative Rule Condition.

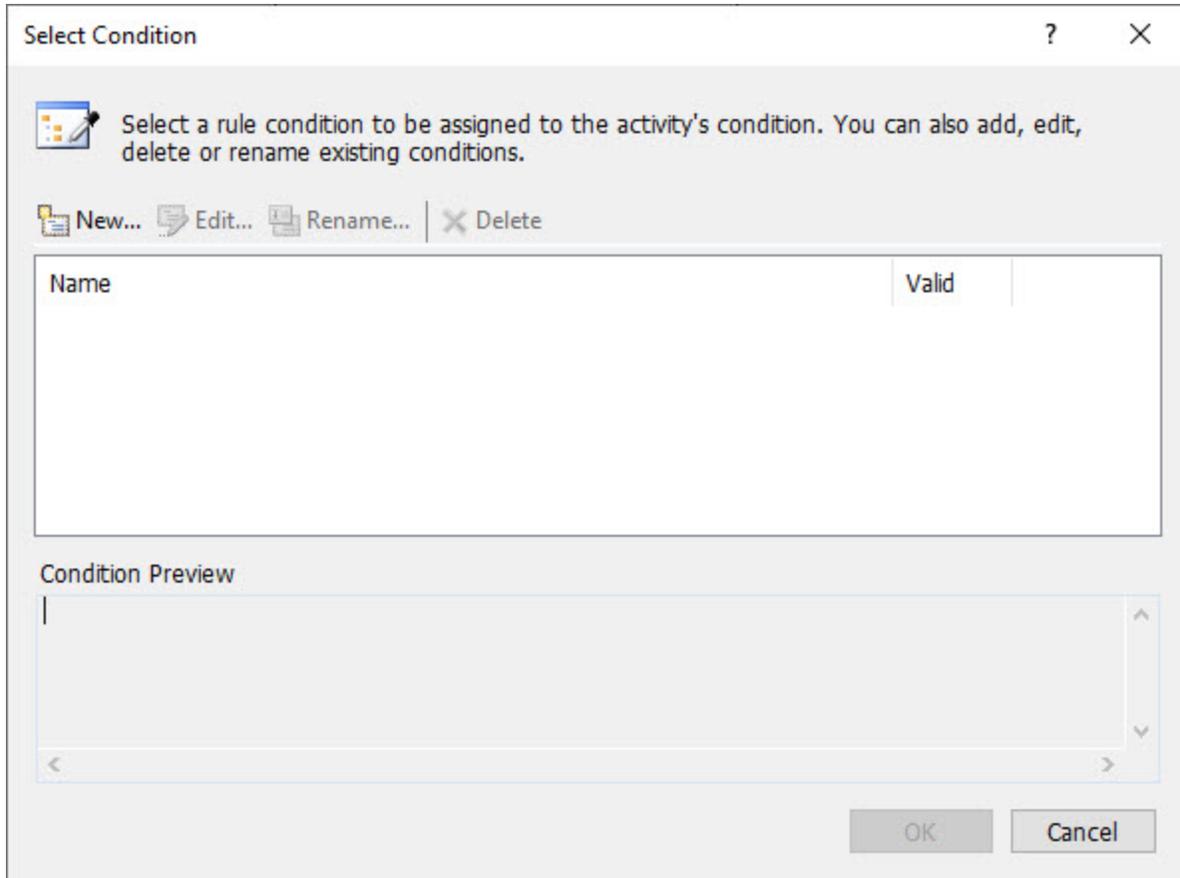


### Declarative Rule Condition:

3) Select Declarative Rule Condition and expand the Condition tree, as displayed below. Give the Condition Name in the available textbox.



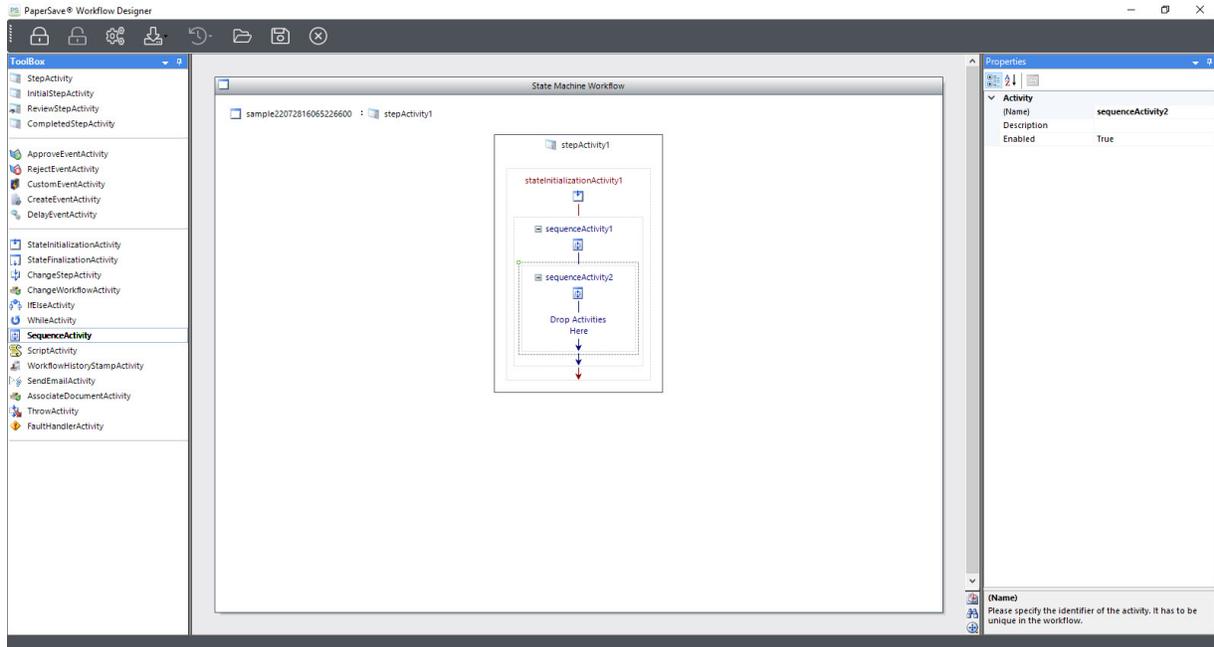
4) Click on the **Ellipsis** icon for Expression, to define the Condition. Select Condition screen appears, as below. You can define the condition as required and click on the **OK** button to save the condition.



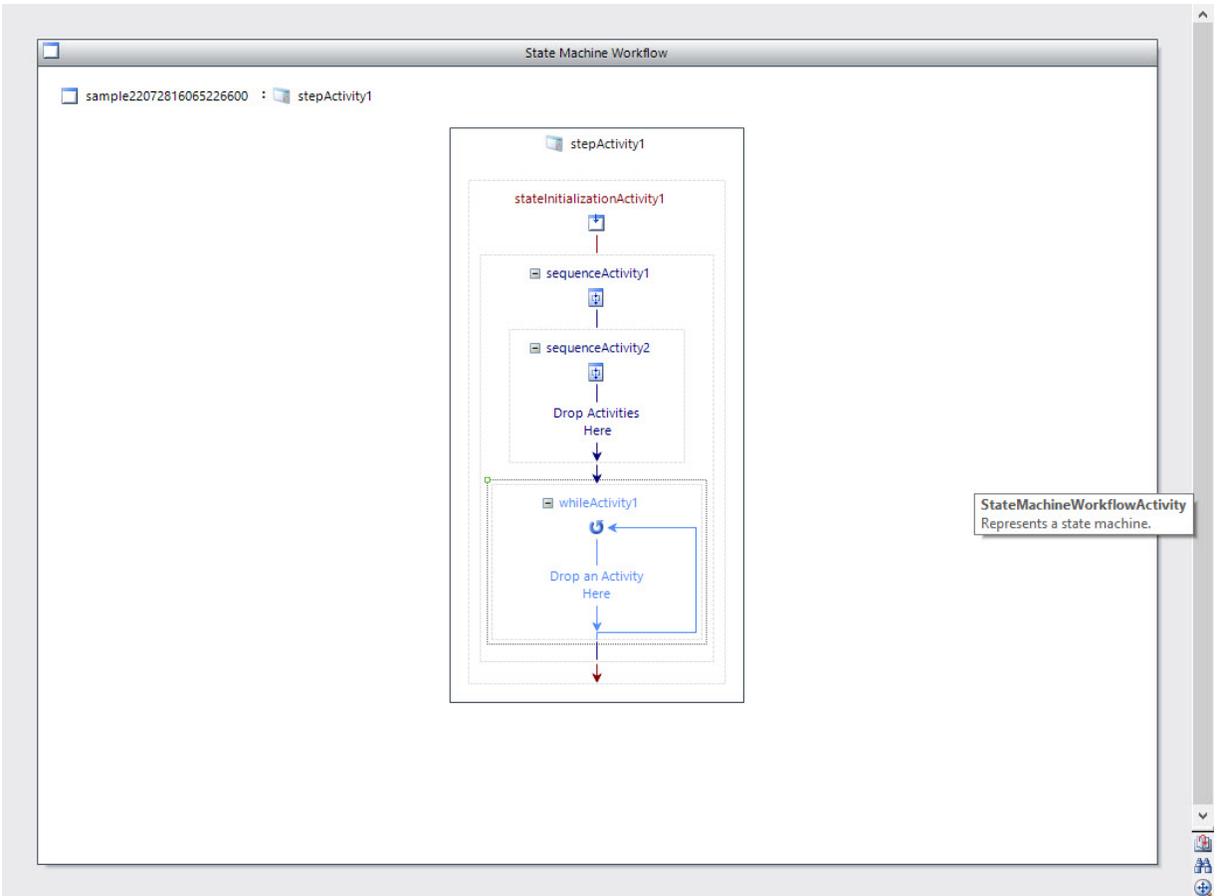
## Sequence Activity

The SequenceActivity activity provides a simple way to link multiple activities together for sequential execution. The SequenceActivity activity executes its child activities in sequence, completing one activity before moving on to the next, and so on, until the completion of the last child activity.

1) Drag and Drop SequenceActivity within an Event Activity, For Example, CustomEventActivity, as below:

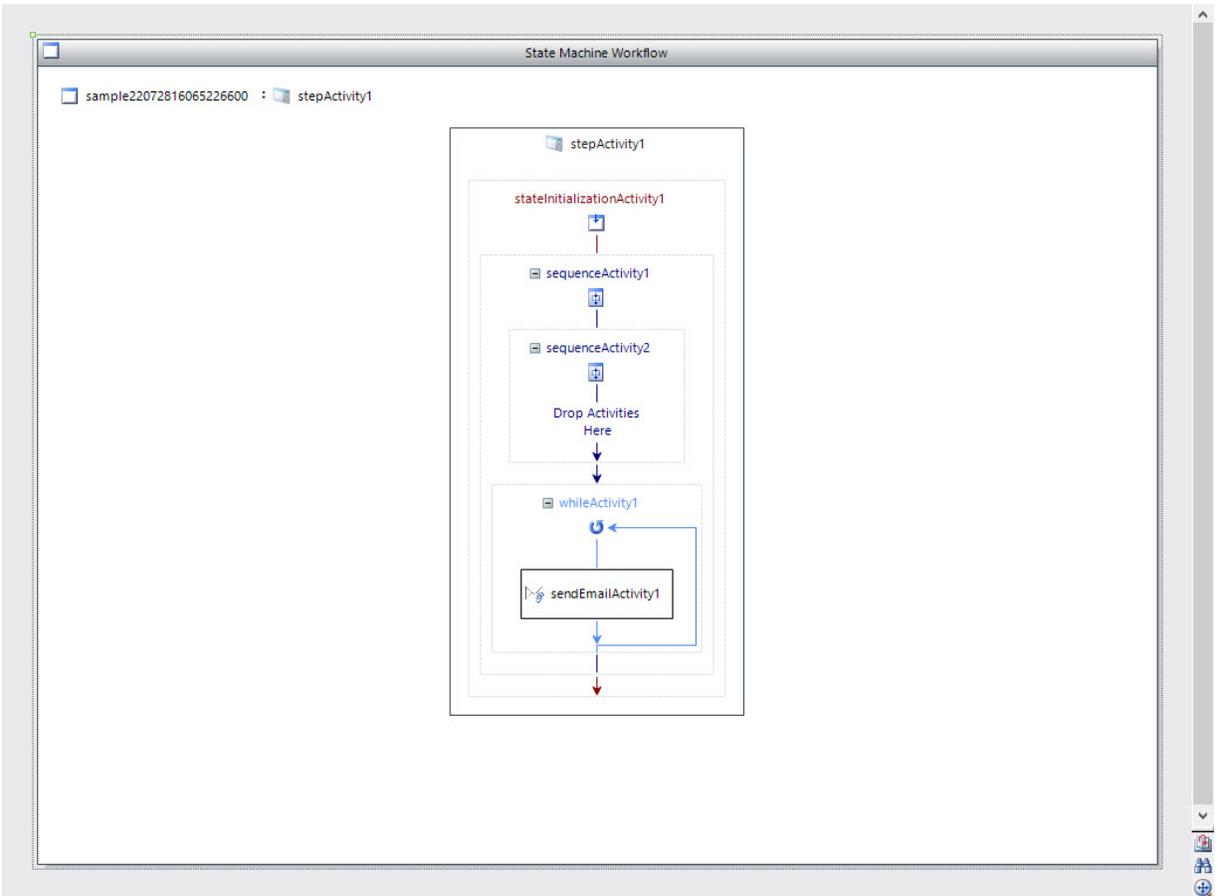


2) Now, drag and drop WhileActivity within SequenceActivity as displayed below:



3) Now, within a WhileActivity, you can drag multiple event activities as per the requirement. For Example, let us drag and drop sendEmailActivity as displayed below.

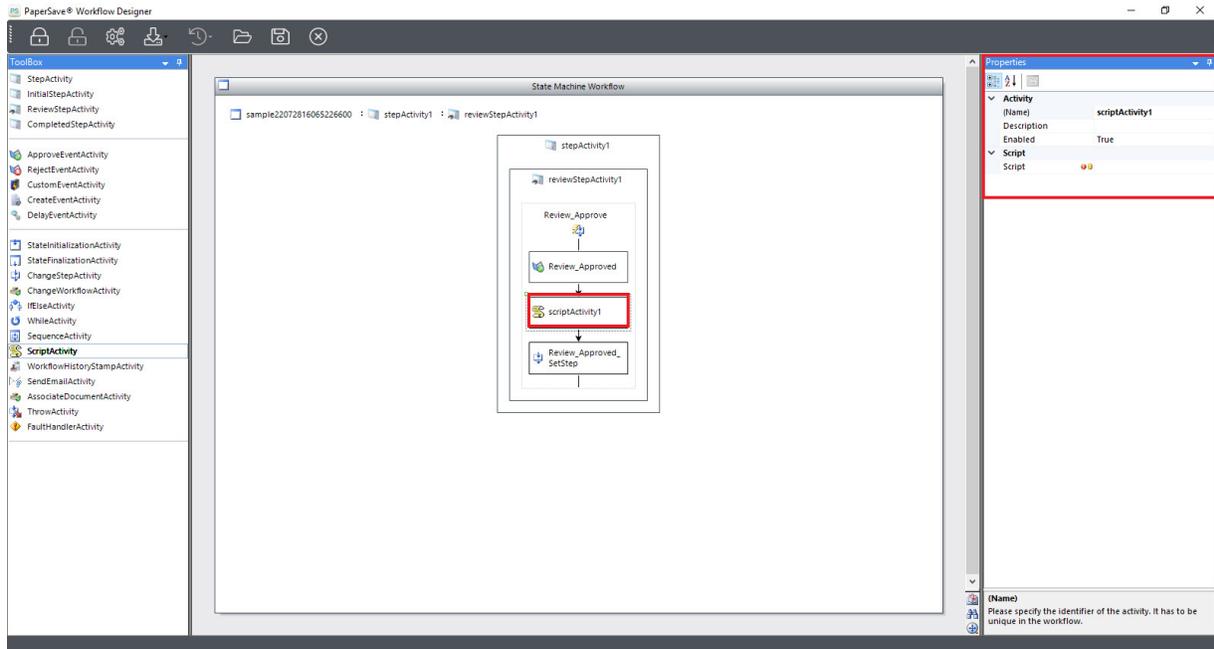
You can write the condition for WhileActivity in the manner in which you would like the events to be executed.



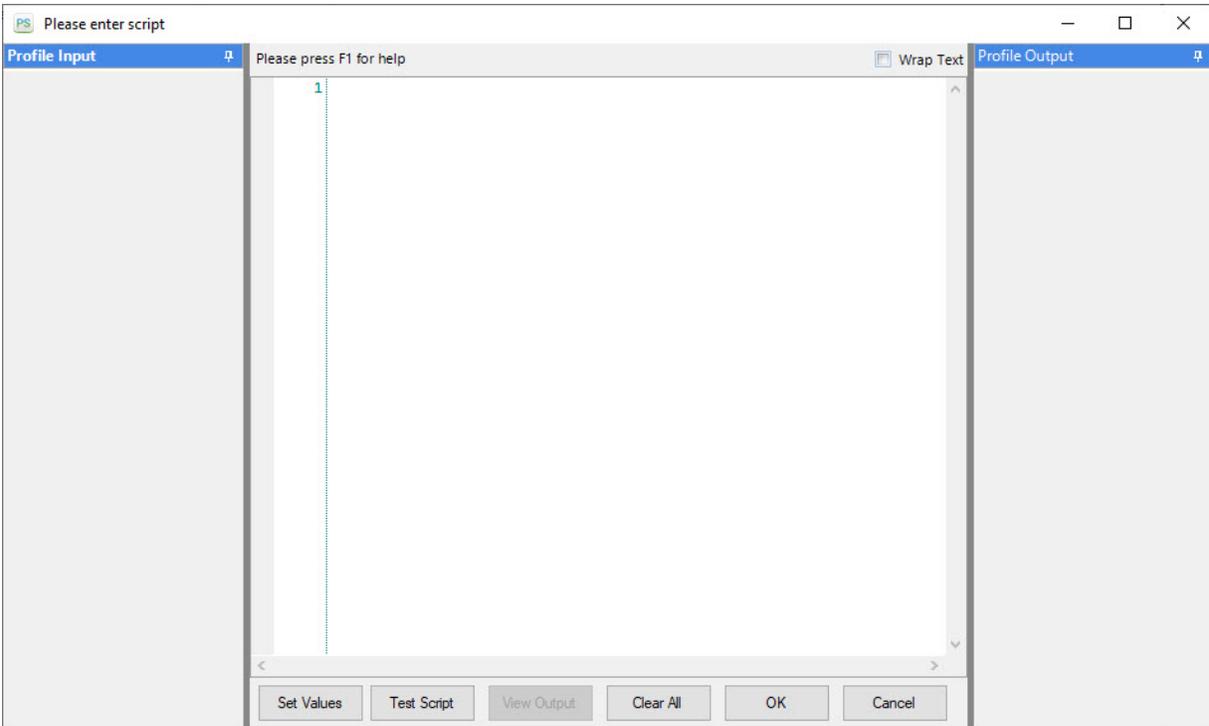
## Script Activity

This activity allows you to use JavaScript to execute a specific function. For Example, there might be a scenario where logic work has to be completed before checking a condition or taking an action. In a sorting Workflow, there might be conditions that are met to determine the correct Queue into which an item should be moved. Instead of having to use specifically defined (and static) IfElse conditions for each department, you could input a Script Activity to determine where to sort the item based on metadata entered in the Profile Fields. This function could also be used to change the value of a Profile Field, i.e., automatically assign an account number for a department. Anything that can be written in Java, i.e. looking up a value from a database, can be used here.

1) To create a State Activity, drag an appropriate activity into the design area, then drag and drop the ScriptActivity under an event after which you want ScriptActivity. The Properties of ScriptActivity will appear, as shown below:



2) Click on **Bind** in the Script box. Please enter the script screen will appear.



3) Enter the server-side JavaScript you want to execute within this workflow activity. You can use PaperSave Profile Fields by using the `\"profile\"` object followed by a `\".\"` and the field name (use `\"_\"` for spaces if profile field has spaces).

For Example: `profile.Invoice_Amount` (for a profile field called `\"Invoice Amount\"`).

You can add your own variables using the `\"Globals\"` object. Use `Globals.add(\"Global Value Name\", \"Global Value\")`. You can access Global values set in this Script Activity or preceding Script Activities by using the following syntax `Globals[\"Global Value Name\"]`. Remember that all object names are case-sensitive. You can test the script by providing test values in the **Profile Input** section on the left and then by clicking on the **Test Script** button. Output profile values will be displayed in the **Profile Output** section on the right. You can view the output XML by clicking on the **View Output** button. Click [here](#) to get the list of PaperSave Variables that can be used while executing script.

PaperSave 5.2 provides you the facility to fetch the value from the columns of the Table Type Profile Field by below mentioned Syntax:

**`profile.TableTypeFieldName[RowIndex].ColumnName`**

In the above Syntax,

- `TableTypeProfileFieldName` stands for the name of the table type profile field.
- `RowIndex` stands for the index of the row of the table for which you want to fetch the value.
- `ColumnName` stands for the name of the column for which you want to get the value.

Besides this PaperSave also provides you with below mentioned three properties:

- 1) **`profile.TableTypeFieldName.length`**: This property is used to get the length of the table-type profile field.
- 2) **`profile.TableTypeFieldName.NextRowIndex`**: This property is used to get the value of the next row index.
- 3) **`profile.TableTypeFieldName.LastRowIndex`**: This property is used to get the value of the last row index.

For more examples, click [PaperSave JavaScript library functions](#).

#### 4) **Accessing Workflow Parameters:**

PaperSave gives you the ability to access Workflow Parameters using ScriptActivity. Click [here](#) to know more about Workflow Parameters. Below is the syntax available for accessing Workflow Parameters using ScriptActivity:

**Note:** With PaperSave 5.2.1, you will experience a more easy and convenient way of writing scripts in the script editor window for various classes like Profile, Parameter, Globals, etc. So this will ultimately reduce the human error caused during writing the scripts. Click [here](#) to know more about Javascript Intellisense.

```
Parameters["Name of the parameter (eg: GLCreditAccount)"]
```

For your easy understanding, below is the example available for the usage of above syntax in the Script Editor window.

```
if (Parameters["GLCreditAccount"] == 'xxx-xxxx-xx')
{
PaperSave.ShowMessage("Approve");
}
else
{
PaperSave.ShowMessage("Reject");
}
```

**Note:**

1) When PaperSave.ShowMessage function is used while writing Scripts in Script Editor window and as you click on the Test Script button, below displayed warning message will open. This message says that PaperSave does not allow showing messages with server-side scripts if PaperSave.ShowMessage function is used in ScriptActivity and as a result, your script may not run properly.

2) Moreover, if PaperSave.ShowMessage function is used in ScriptActivity then while the Workflow is compiled or published, below displayed warning message will open. This message warns you that you have used PaperSave.ShowMessage or Windows.alert functions within the ScriptActivity of Workflow. PaperSave does not allow showing messages or alerts within server side scripts. As a result your script may not run properly. Clicking on the OK button will compile the workflow normally.

4) Generating Custom Error Message from Script Editor

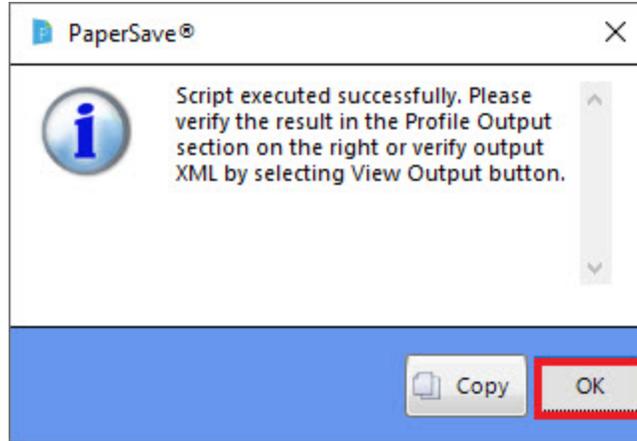
PaperSave 5.2 gives you the ability to generate custom error messages by writing a script in the script editor window in below-given format:

**throw new Error("<message text>")**

You can write the script as given in below example:

```
try{
if(<condition if true>)
throw new Error("<My Exception Message">);
}
catch(e)
{
throw (e.message);
}
```

5) Once you have written the script in the Script Editor window, click on **Test Script** to evaluate the script. If the script will get successfully executed then you will be able to view below-displayed message. Click on the **OK** button to exit the screen.



Thereafter you can view the output of the executed script by clicking on View Output button. As you click on the View Output button, View Script Output Screen will appear, as displayed below.

The image shows a 'View Script Output' window with a table of parameters. The table has two columns: 'Parameter Name' and 'Parameter Value'. The 'Parameter Name' column is sorted in descending order. A category 'Misc Field (32 items)' is expanded, showing a list of parameters. The 'HOSTAPPLICATION' row is highlighted in blue.

Parameter Name	Parameter Value
AUDITMODULES	
COMPANY_NAME	
CURRENT_OWNER	
CURRENT_STATE	
CURRENT_STEP	
CUSTOMEVENT_NAME	
DAYS_IN_CURRENT_STEP	0
DAYS_IN_CURRENT_STEP_AND_OWNER	0
DOCUMENT_CREATED_BY	
DOCUMENT_CREATED_DATE	
DOCUMENT_ID	
DOCUMENT_TYPE	Appeal Mail List Documentation
FROMEMAIL	
HAS_BEEN_ASSOCIATED	
HOSTAPPLICATION	Blackbaud Enterprise CRM
IS_ASSOCIATED	false
MIME_TYPE	
MODULE	Records
PARENTID	
QUEUE_ID	
QUEUE_NAME	
QUEUEITEM_FILENAME	
QUEUEITEM_ID	
SMTP	
SMTP_USER	
TRANSACTION_TYPE	Appeal Mail List

6) You can even bind custom parameters by clicking on **Set Values**. Set Custom Parameters window opens. You can fill in the details for the desired fields under the respective column.

Parameter Name	Parameter Value
Category : Misc Field (34 items)	
AUDITMODULES	
COMPANY_NAME	
CONNECTIONSTRING	Data Source=TCP:PSQLVM01S;Initial Catalog=PaperSaveqaanap2p;Integrated Security=True;MultipleActiveRes...
CURRENT_OWNER	
CURRENT_STATE	
CURRENT_STEP	
CUSTOMEVENT_NAME	
DAYS_IN_CURRENT_STEP	0
DAYS_IN_CURRENT_STEP_AND_OWNER	0
DOCUMENT_CREATED_BY	
DOCUMENT_CREATED_DATE	
DOCUMENT_ID	
DOCUMENT_TYPE	Appeal Mail List Documentation
FROMEMAIL	
HAS_BEEN_ASSOCIATED	
HOSTAPPLICATION	Blackbaud Enterprise CRM
IS_ASSOCIATED	false
MIME_TYPE	
MODULE	Records
PARENTID	
QUEUE_ID	
QUEUE_NAME	
QUEUEITEM_FILENAME	
QUEUEITEM_ID	
SMTP	
SMTP_PORT	

7) Provide the appropriate values for the desired settings and click **Close**.

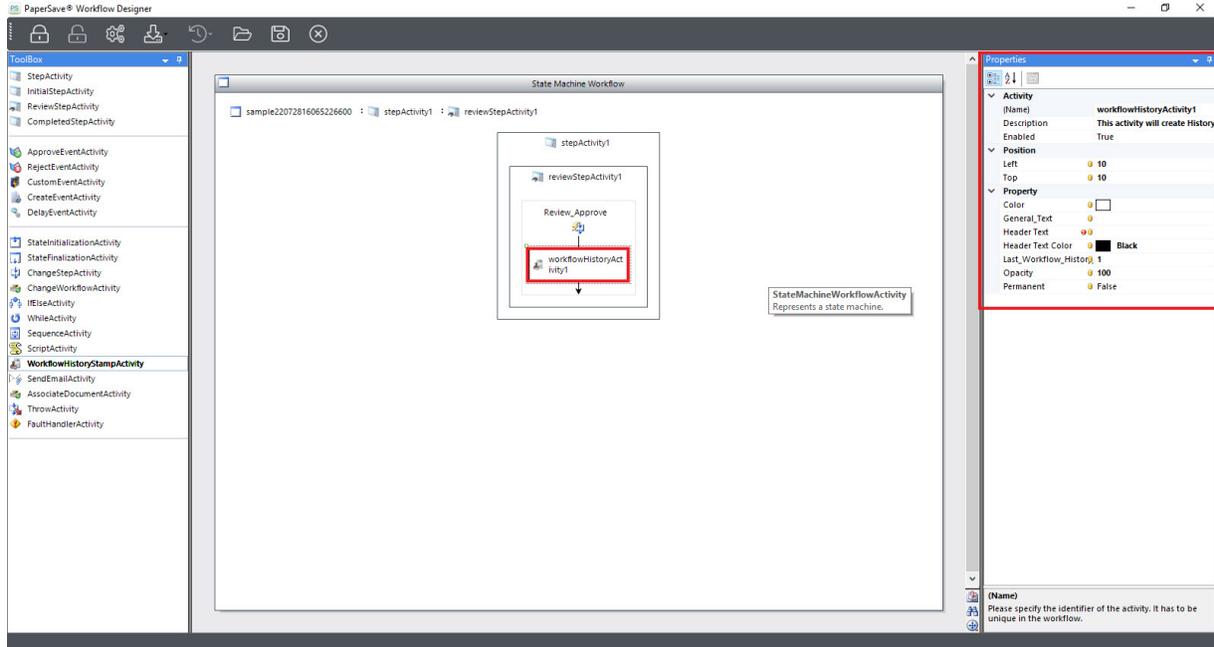
### Workflow History Stamp Activity

This activity allows you to create details of the Stamp annotation on a PDF Document only. You can place this activity in any location on the Workflow.

To use the WorkflowHistoryStampActivity you need to set the following Properties:

1) To create a WorkflowHistoryStampActivity drag an appropriate activity into the design area, then drop the WorkflowHistoryStampActivity under a ChangeStep after which you want WorkflowHistoryStampActivity.

2) The Properties of WorkflowHistoryStampActivity will appear as shown below.



The properties are as follows:

Property Name	Description
Left	This integer value will define the annotation in the Left location of the Document.
Top	This integer value will define the annotation in the Top location of the Document.  <b>Note:</b> If the position is out of the Document, then the annotation will be added to the Top 10 and Left 10 positions.
Color	Select a color that you want to set for the workflow history table row

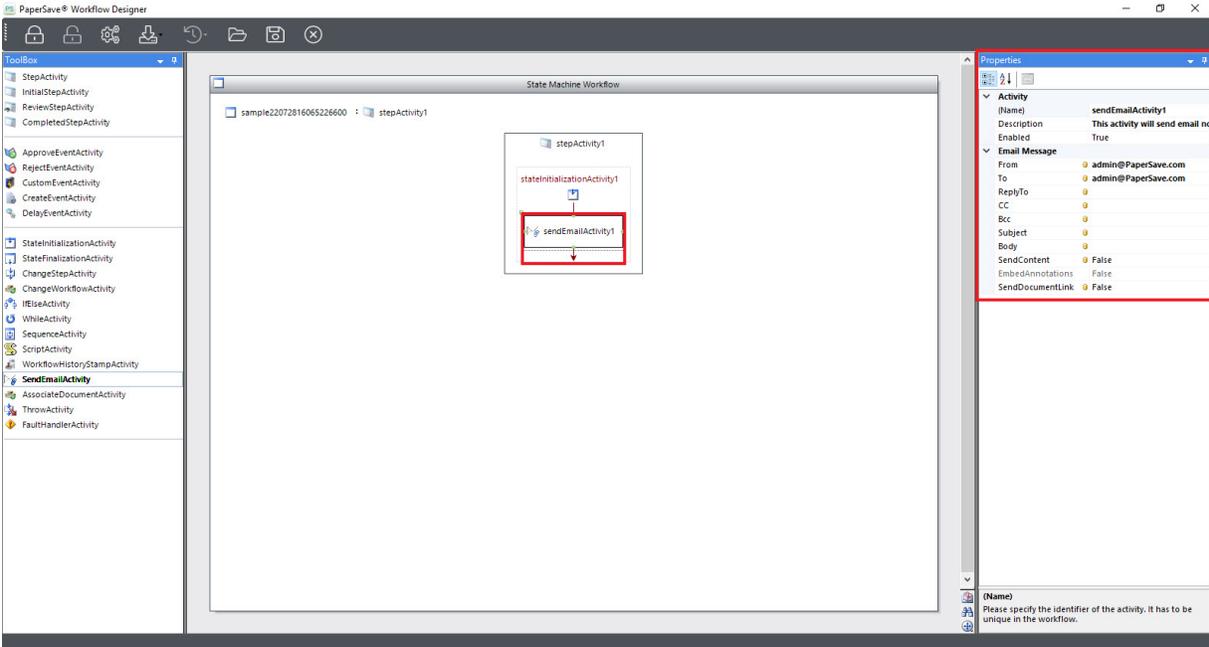
	and column header.
General_Text	This text will be displayed with annotations. You can use the Workflow Designer to set values. Also, you can use Profile[""], Globals[""], and Parameters[""] to make dynamic values on a Stamp annotation.
Header Text	Enter the text that you want to set for the workflow history table header.
Header Text Color	Select a color that you want to set for the workflow history table header.
Last_Workflow_History	This is an integer value that represents how many historical details can be shown including the current event. History can be shown as an Event Name, Event Raised By, and Raised On.
Opacity	This property allows you to set the opacity of the workflow history table.
Permanent	This Property determines whether or not Annotation is embedded in the document. If the value is set to "False" then you can move the annotation from one place to another. However, if the value is set to "True" then the annotation is placed in a permanent location.

## Send Email Activity

SendEmailActivity is responsible to send email notifications to the designated users for the Workflow Items depending on the Step at which the SendEmailActivity is defined. Recipients of the email can open the Workflow Item in Document Display Interface and perform the necessary actions.

To use SendEmailActivity you need to set the following properties:

1) To create a Step Activity drag an appropriate activity into the design area, then drag and drop the SendEmailActivity under an event after which you want SendEmailActivity. 2) The Properties of SendEmailActivity will appear, as shown below:



2) Enter the details for the various attributes of the Properties.

Property Name	Description
Name	Provide a name for the activity in this text box.
Description	Provide the description of the activity in this box.
Enabled	Select True/False from the drop-down list to Enable/Disable this activity.
From	Type the email address from which the email is to be sent.
To	Type the email address of the recipient to whom the email is to be sent in this box.

ReplyTo	Type the email address to which the reply is to be received.
CC	Type the email address to be kept in CC.
Bcc	Type the email address you want to keep in Bcc.
Subject	Type the subject of the email to be sent in this box. Body Type the body of the email in this box.
Body	Type the body of the email in this box.
SendContent	Select True/False to determine whether to send the content of the document as an attachment or not.
EmbedAnnotations	This property will be enabled ONLY if the SendContent property is set to True. You can set the property of this field as True or False. If this property is set as True then the annotations will be embedded along with the document content that is being sent as an attachment when the Send Email Activity is raised during the processing of the Workflow Item.
SendDocumentLink	Select True/False to determine whether to send a link to the document to the recipient or not. If the link to the document is sent to the recipient, then you can view the document by clicking the link provided.  <b>Note:</b> You are allowed to add multiple email addresses under the "To", "CC" and "BCC" textboxes separated by a semicolon (;).

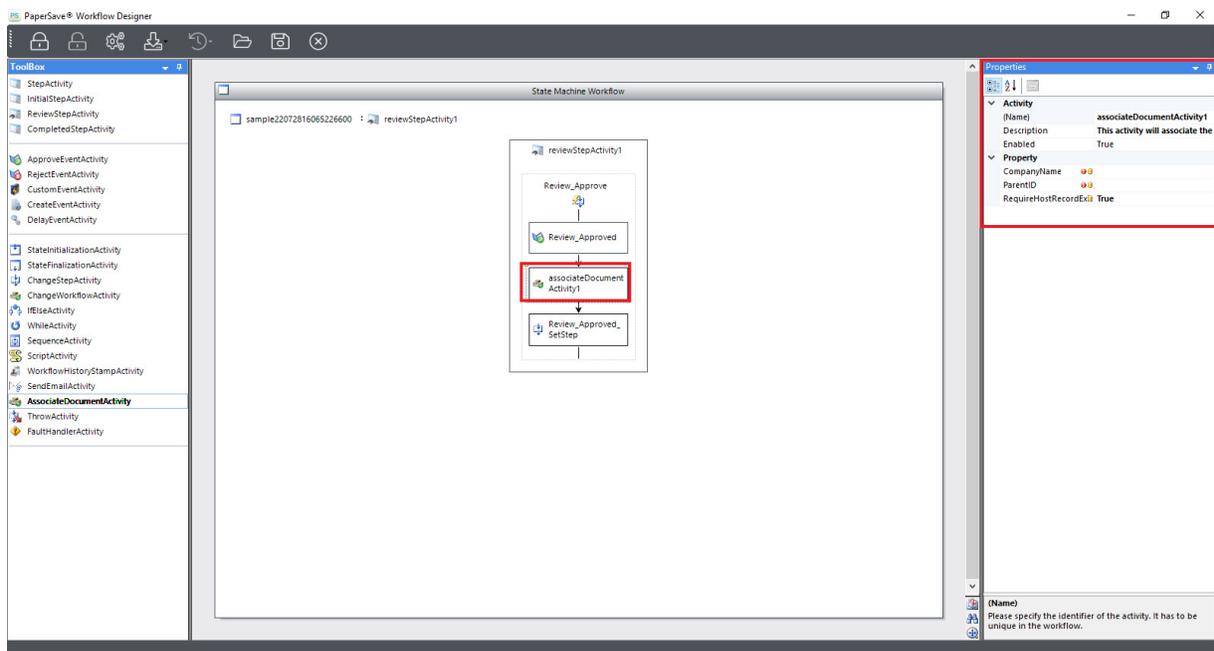
## Associate Document Activity

This activity allows you to associate a document with a host record for the selected Company and ParentID.

**Note:** If AssociateDocumentActivity exists in a specific step of the Workflow then Workflow User will be able to add the document even if the user is not authorized to do so.

To use AssociateDocumentActivity, you need to follow below-given steps to set the properties of the activity:

1) To add AssociateDocumentActivity to a specific step, you need to drag and drop the activity under any event (For Example, Approve/Reject/Custom Event).



2. You can set below mentioned properties:

Property Name	Description
CompanyName	Click on the <b>Ellipsis</b> icon and select the Company Name with which you want to associate the document with the completion of the activity.
ParentID	Click on the <b>Ellipsis</b> icon and select the ParentID (Unique ID) with which you want to associate the document on completion of the activ-

	<p>ity.</p> <p><b>Note:</b></p> <p>1) CompanyName and ParentID are mandatory fields to be set for this property.</p> <p>2) Moreover, whenever the Workflow Item for the respective Workflow is processed and the event before the AssociateDocumentActivity gets executed, the document will get associated with the host record for the selected Company Name and ParentID.</p>
RequireHostRecordExistence	<ul style="list-style-type: none"> <li>• If the Property of RequireHostRecordExistence is set to TRUE and incorrect Parent ID is provided in such case, Association will not happen and the workflow item will remain in the same step. The entire workflow item will be displayed in red.</li> <li>• If the Property of RequireHostRecordExistence is set to FALSE then no matter whether incorrect Parent ID or Correct Parent ID is provided, association will happen. But in case of an incorrect ParentID, it will insert a blank HALD with the given ParentID in the HostApplicationLocalData table in the database.</li> </ul>

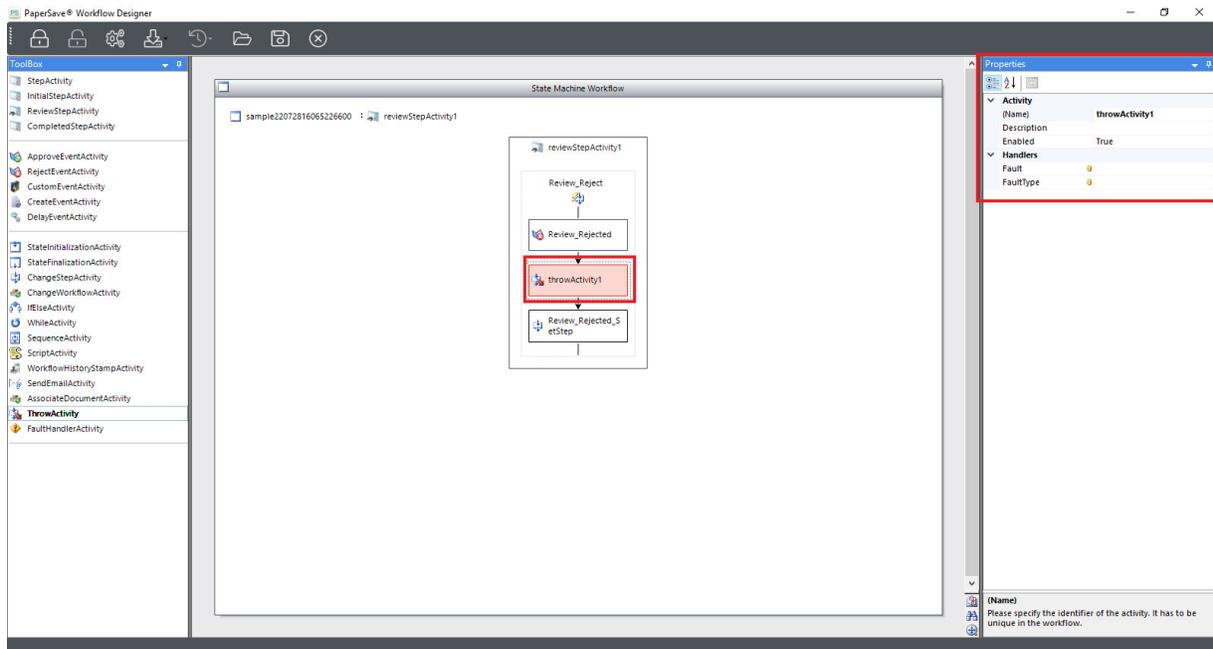
## Throw Activity

The purpose of the ThrowActivity activity is to raise exceptions declaratively, usually in response to exceptional conditions detected in a workflow.

The ThrowActivity activity can point to an exception object in the workflow that is derived from Exception, using the Fault property; if the Fault property is set to a specific exception instance, setting the FaultType property is not required. The execution of the ThrowActivity activity throws the exception object in the .NET

Framework sense, which is using the C# throw statement. This is equivalent to a code handler of an activity throwing the exception in user code.

You can drag and drop the activity within an Activity as displayed below.



## Fault Handler Activity

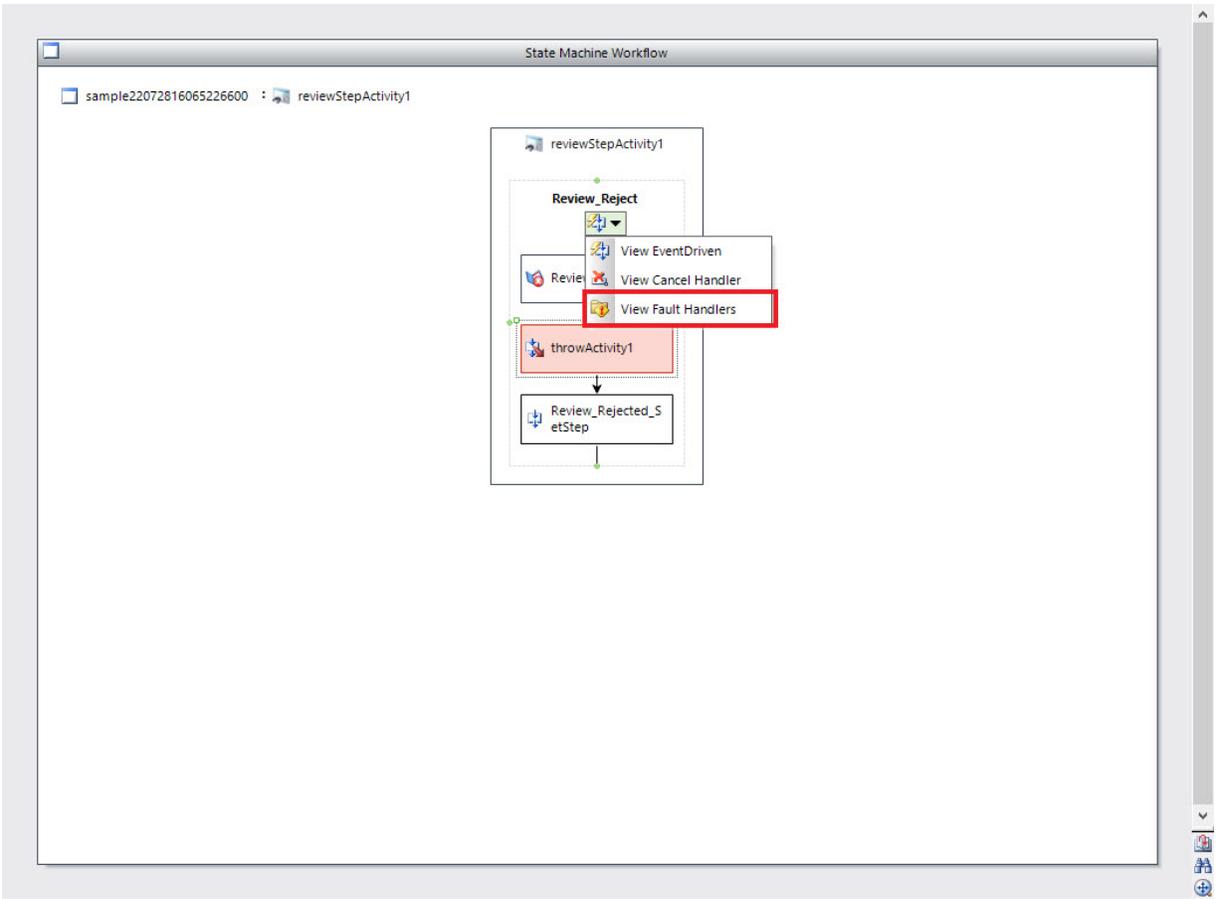
Fault handling in Windows Workflow Foundation refers to the handling of exceptions in an asynchronous manner. This means that exceptions that are thrown in an activity (explicitly or implicitly) are caught by the workflow runtime engine and then scheduled in a queue to be handled at a later time. This differs from normal exception handling in that if an exception is thrown in a try block, it is either caught by the appropriate catch exception block or is thrown to the user immediately.

## Use the FaultHandler Activity to Handle Exceptions

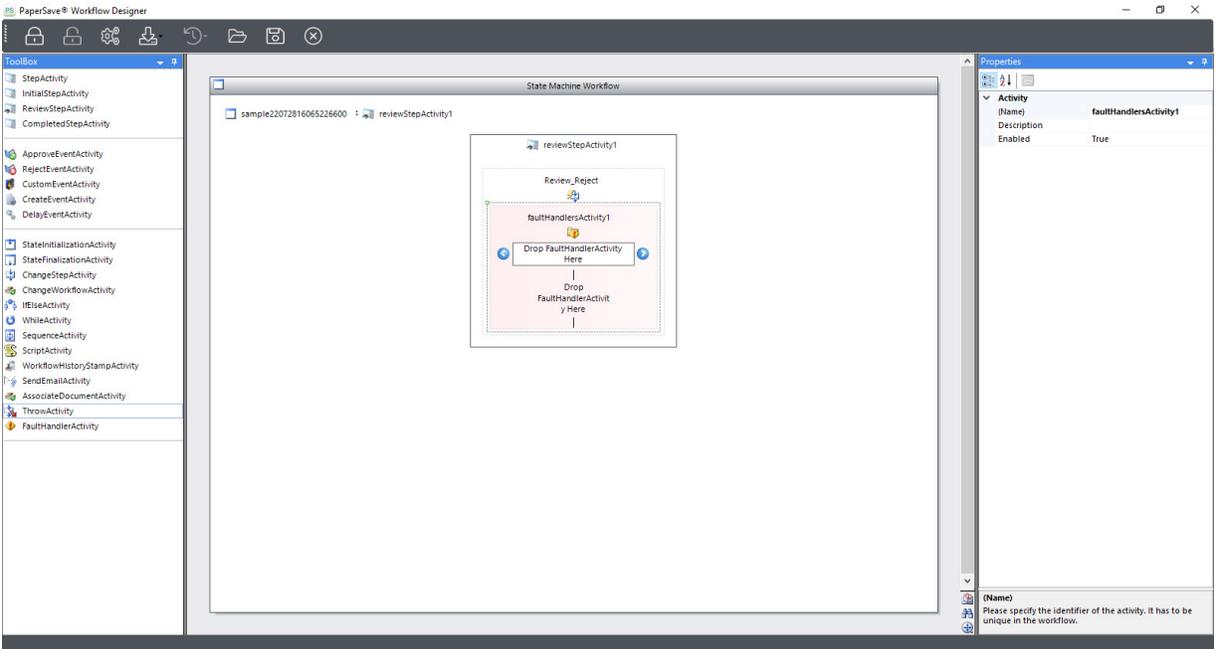
There are two ways you can handle exceptions in a workflow. The first is to use a try-catch block in your code. The try-catch block enables you to handle exceptions in the code that caused the exception. You can then write additional code to take an action. The second way to handle exceptions is to use the FaultHandler activity. This activity handles a specific fault type and enables you to execute workflow activities in response to an exception. You can use these activities to perform cleanup and recovery.

You can associate a FaultHandler activity with the workflow itself or with any container activity in the workflow (except for the TransactionScope and CompensatableTransactionScope activities). You will now add a FaultHandler activity to the workflow to handle the file not found an exception as follows:

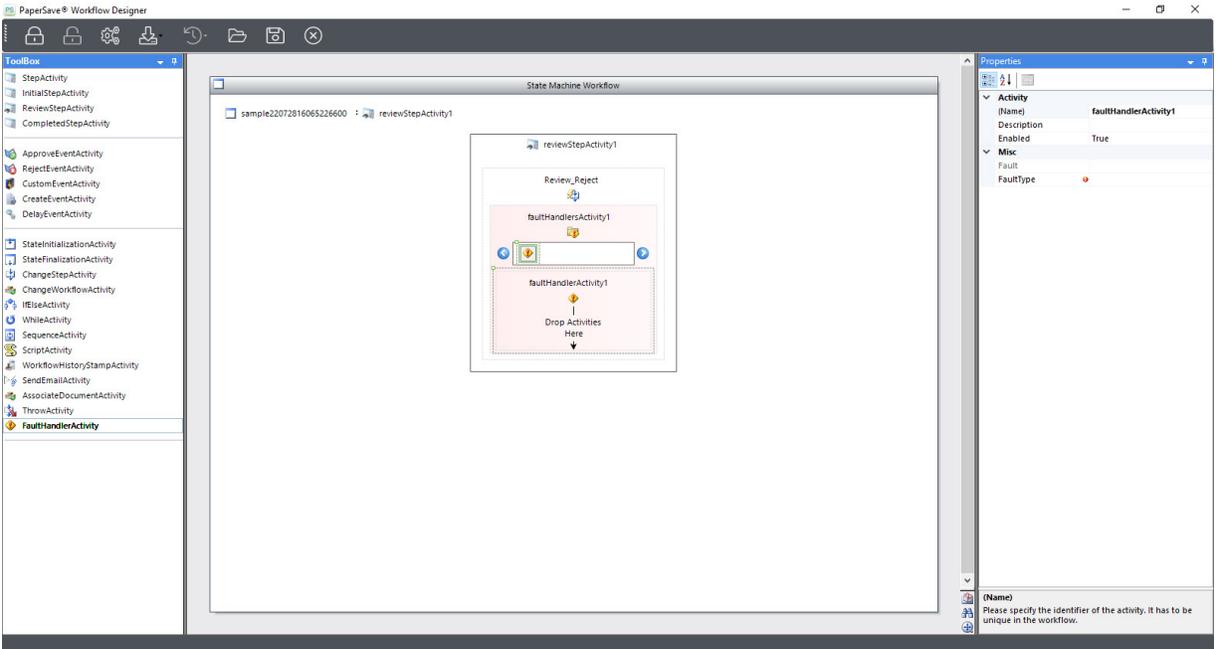
- 1) Navigate to any **Workflow Event Driven Activity** where you want to add FaultHandlerActivity, expand the **Arrow** icon, and select the View Fault Handlers option from the list as shown below:



2) You can drag and drop the FaultHandlerActivity in the grid as shown below.



Thereafter, you can view the following icon for Fault Handler Activity. The right side of the window shows the Properties associated with FaultHandlerActivity.



The properties are as follows:

Property Name	Description
Fault	Enter the name that you want to give to the fault.
FaultType	Click on the <b>Ellipsis</b> icon to set the type of fault that you want to run when a fault is thrown on the activity.

## Contextual Menu

When you right-click on a StepActivity, EventDriven Activity, or Activity in the Workflow design area, then a pop-up menu appears that allows you to perform certain actions.

**Note:** Some context menus apply only to their respective StepActivity, Event Driven Activity or Activity.

Context Menu	Description
Move Left	Select this option to move the activity to left.
Move Right	Select this option to move the activity to right.
Back to Step Composition View	Select this option to go back to the previous step of the workflow.
Set as Initial Step	Select this option to set the step as the first step of the workflow.
Set as Completed Step	Select this option to set the step as the last step of the workflow.
Add Step	This option allows adding a step within the workflow and event-driven activities.
Add EventDriven	This option allows adding an event-driven activity within step activities.
Add StepInitialization	This option allows adding a step initialization activity within step activities.

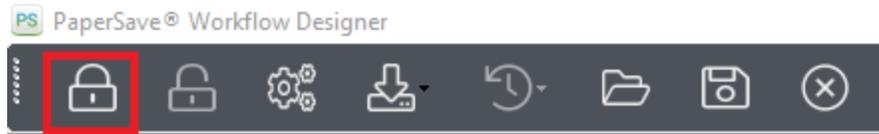
Add StepFinalization	This option allows adding a step finalization activity within step activities.
Bring to Front	Select this option to bring the step activity to the front.
Send to Back	Select this option to send the step activity to the back.
Cut	This option allows you to cut a step, event driven activity, or activity from its original position to the new position in the workflow.
Copy	This option allows you to copy a step, event driven activity, or activity from its original position to the new position in the workflow.
Paste	This option allows you to paste a step, event driven activity, or activity from its original position to the new position in the workflow.
Delete	This option allows you to delete a step, event driven activity, or activity from its original position to the new position in the workflow.
View EventDriven	This option allows you to view event driven activity.
View Cancel Handler	This option allows you to view cancel handler activity.
View Fault Handlers	This option allows you to view fault handler activity.
View StateInitialization	This option allows you to view state initialization activity.
Add Branch	It is used to add a new branch to the ifelse activity.
View IfElse	This option allows you to view the ifelse activity.

## Ribbon Options

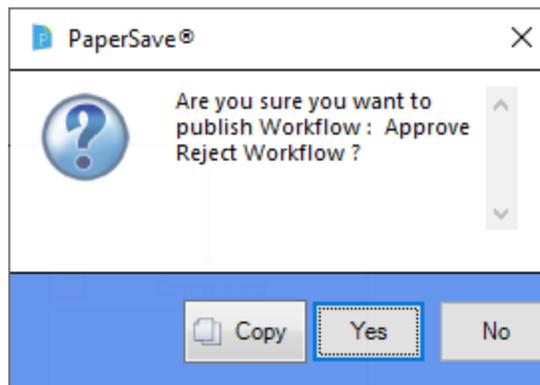
### Publishing a Workflow

A workflow can only be used if it is in a published state. Publishing a Workflow allows you to publish the Workflow once the workflow is designed successfully.

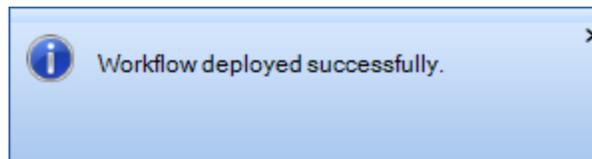
1) To publish a workflow, click on the **Publish Workflow** button to publish the Workflow.



2) A confirmation message is displayed, as shown in the below image. Click on the **Yes** button to publish the workflow.



3) Once the workflow is published, then the following message is displayed.



4) You may also view the status as changed to **“Yes”** in a Published column in the workflow, as shown in the below image.

Name	Integrated App	Module	Document Type	Record Type	Published
Approve Reject Workflow	Blackbaud Enterprise CRM	Records	Appeal Mail List Documentation	Appeal Mail List	No
DM Simple Workflow	Blackbaud's The Financial Edge	Accounts Payable	Correspondence	Invoice	Yes

**Note:** To save any structural changes in the designer of the workflow, first, unpublish a workflow by clicking on the **Unpublish Workflow** button, as shown in the below image. Thereafter, you need to click on the **Design Workflow** in the PaperSave Navigation Menu >> Configuration Area >> Workflow Area. However, you will be allowed to change a few properties of the workflow without unpublishing the workflow. A list of these properties is mentioned below:



Property Name Properties of the Activity/Events	Property Name Properties of the Activity/Events
Target Owner	ChangeStepActivity, ChangeWorkflowActivity
FieldVisibility	StepActivity
NotificationStyle	StepActivity
NotifyStepOwner	StepActivity
Events	StepActivity
Ranks (for Custom Events)	StepActivity
AllowOwnerChange	StepActivity
Ownership Style	StepActivity
Filter by Tag	StepActivity
Possible Owners	StepActivity
CommentsRequired	ApproveEvent, RejectEvent, and CustomEvent

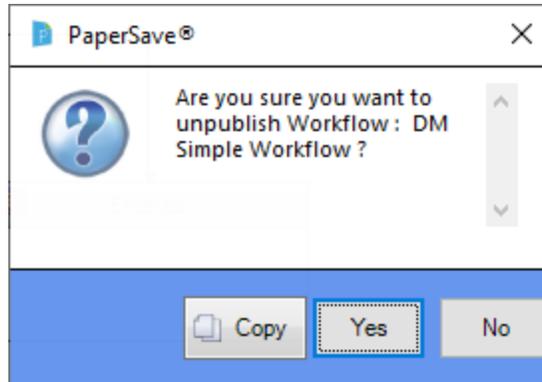
## Unpublishing a Workflow

Unpublishing a workflow allows you to unpublish the Workflow and then update it as required.

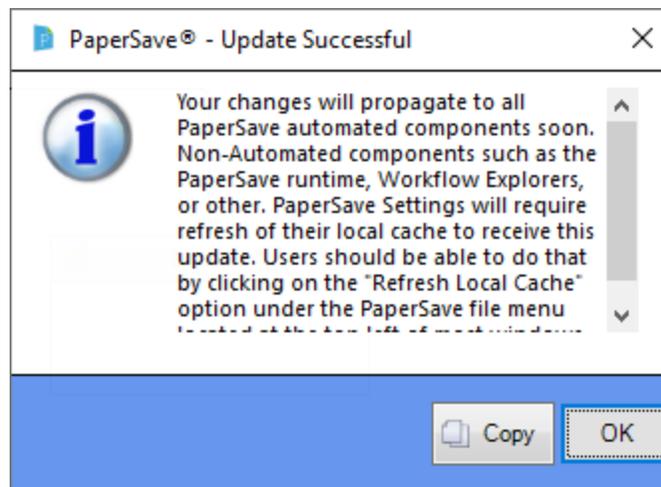
1) To unpublish a workflow, click on the Unpublish Workflow icon, as shown in the below image.



2) A confirmation message is displayed, as shown in the below image. Click on the **Yes** button to unpublish the workflow.



3) As you click on the **Yes** button, the following message is displayed.



4) Once the workflow is unpublished, then you may view the status as changed to "No" in the Published column in the workflow, as shown in the below image.

Name	Integrated App	Module	Document Type	Record Type	Published
Approve Reject Workflow	Blackbaud Enterprise CRM	Records	Appeal Mail List Documentation	Appeal Mail List	No
DM Simple Workflow	Blackbaud's The Financial Edge	Accounts Payable	Correspondence	Invoice	Yes

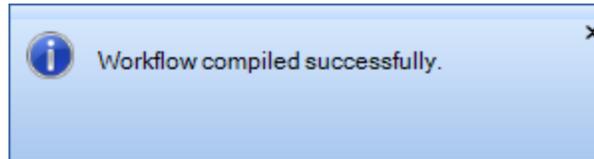
## Compiling a Workflow

Compiling a workflow allows you to execute the workflow. This will help while creating or modifying the workflow. Once the workflow is compiled successfully, then you can ensure that there are no errors. If any error occurs, then the same will be displayed.

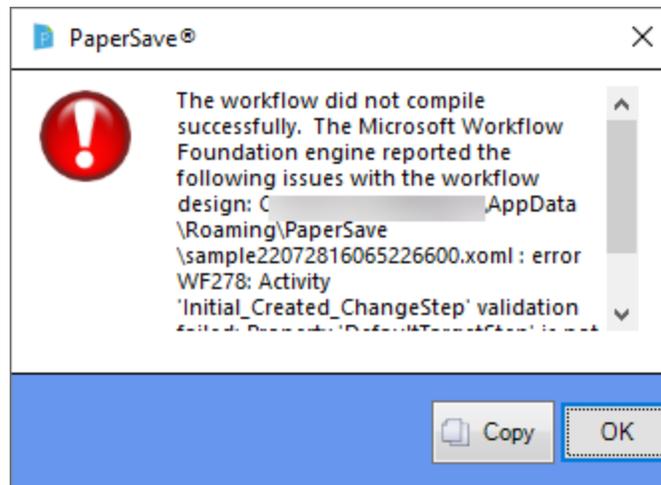
1) To compile a workflow, click on the **Compile Workflow** icon.



2) Once the workflow is compiled successfully, then the following message is displayed.



3) In case any error occurred, then the following message is displayed. Click on the **Ok** button to close the message.

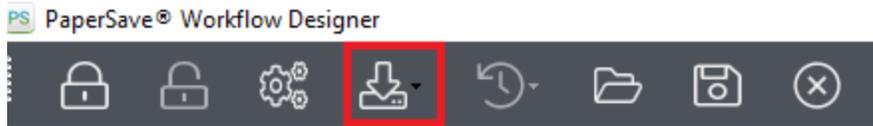


## Workflow Templates

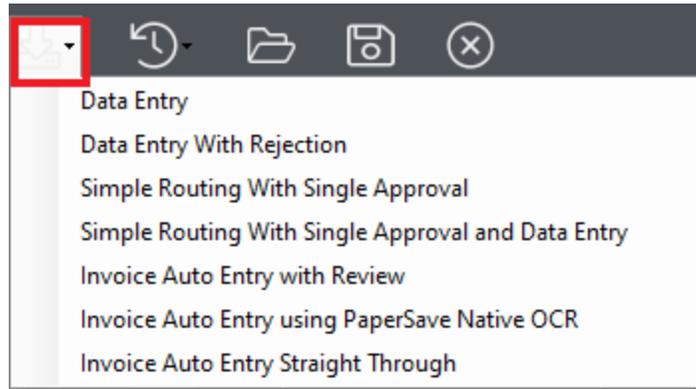
In-built Workflow Templates facilitate you to create your Workflow based on the pre-defined templates instead of creating it from scratch. This Workflow Templates are dynamic and are stored at FTP in a specific location. The list displayed under Workflow Template drop-down list will vary depending on the Add-Ons installed on your machine.

Whenever you will open PaperSave Settings, PaperSave will load the Workflow Templates from FTP, and based on the selected Transaction Type and Document Type, you will be able to view the list of templates in the Workflow Template drop-down list. As you click on the [Workflow Template](#) option, all available templates are displayed in the drop-down list.

1) To use the workflow template, click on the **Workflow Templates** icon.



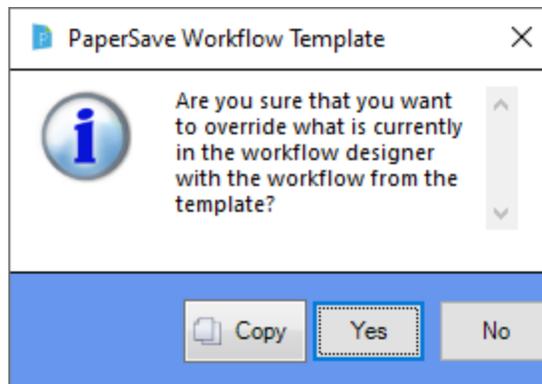
2) The list of workflow templates is displayed, as shown below.



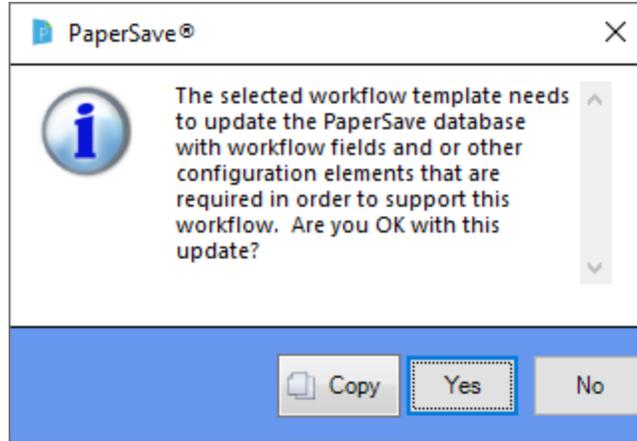
**Note:**

The list of Workflow Templates displayed is not fixed and may change at any point in time.

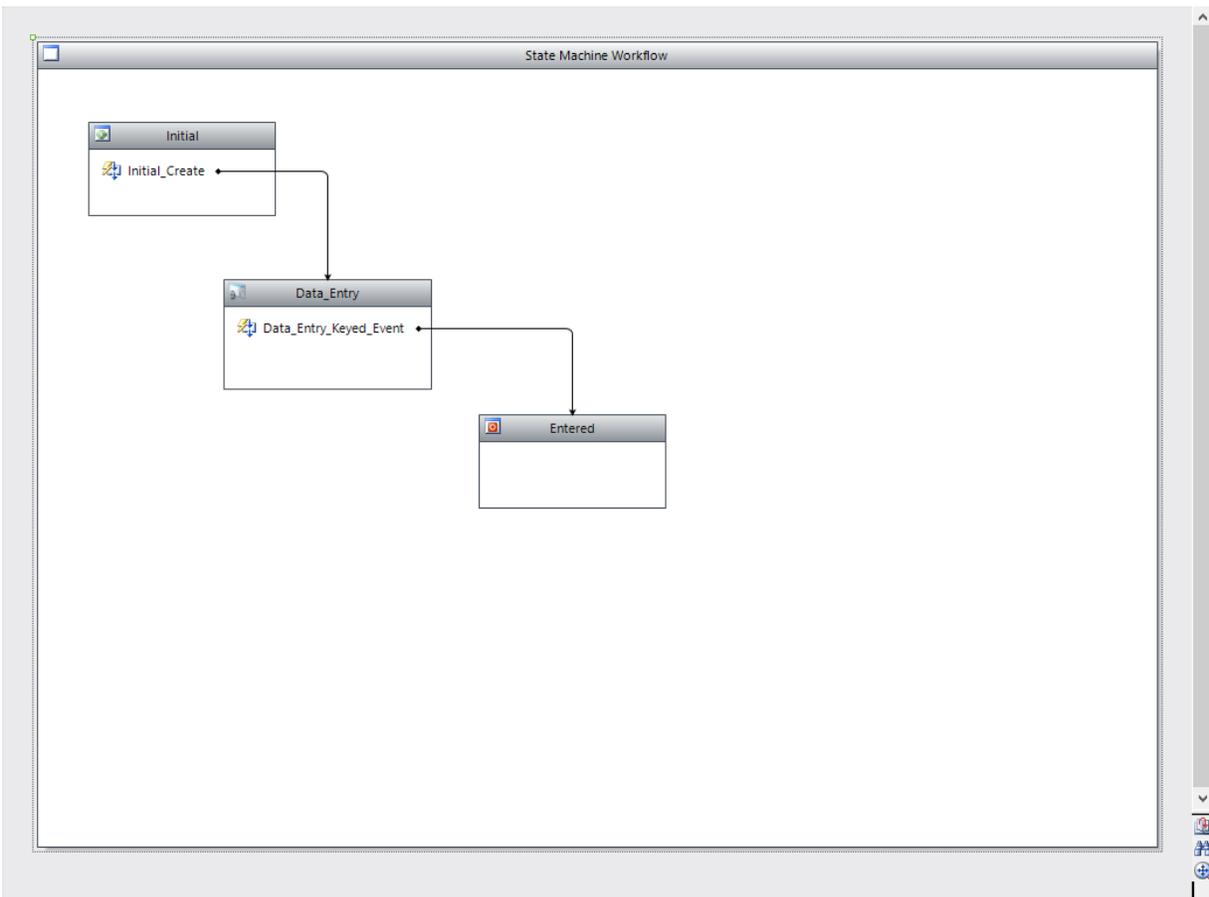
3) Select any workflow template to apply the template in any Document Type. As you select a workflow template, the following message is displayed. Click on the **Yes** button.



5) A confirmation message is displayed below. Click on the **Yes** button to apply the template.



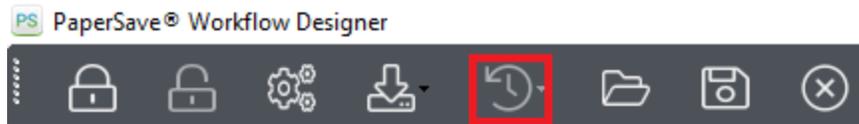
6) Once the template is applied, then you can view the workflow based on the template in the State Machine Workflow screen.



### Restore Workflow

You can restore the workflow

1) To restore the workflow, click on the **Restore Workflow** button.



## Loading Workflow from File

You can use the Load Workflow From File functionality to load a saved workflow from your system and override the current workflow.

### Note:

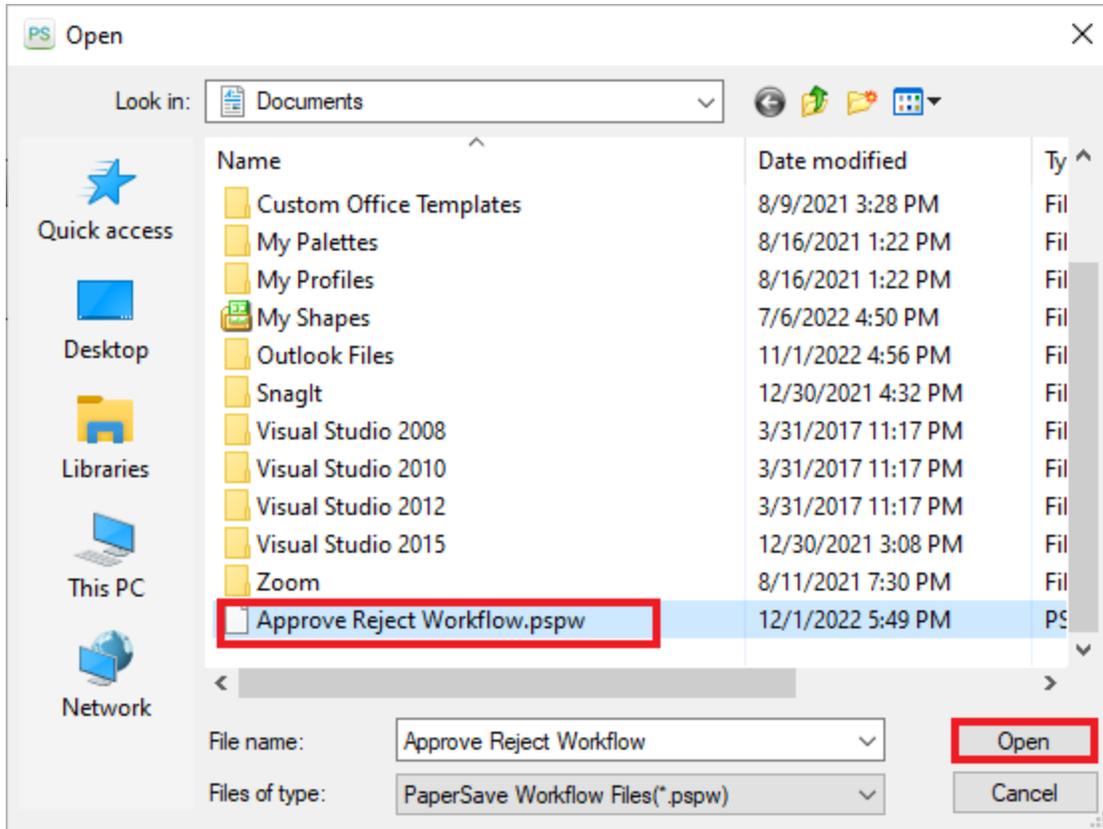
This action will override the existing workflow opened in the design section of the workflow.

To load the Workflow from a file, do the following:

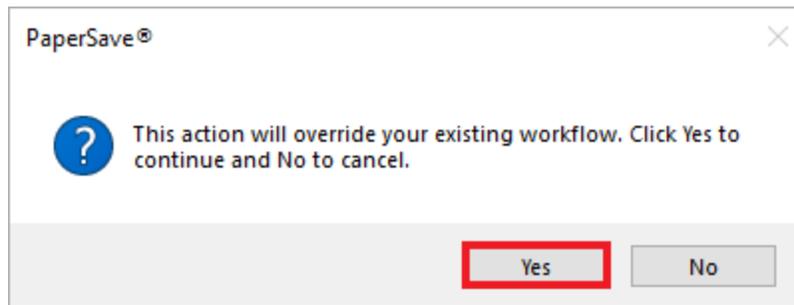
1) Click on the **Load Workflow** from File icon. This will open File Explorer.



2) Select the Workflow that you want to open.



3) A confirmation message is displayed. Click on **Yes** to provide the confirmation.



4) The existing workflow will be overridden by the current workflow.

**Note:**

While Loading a Workflow from a file, you need to make sure that you only import the Workflow 2.0

design into Workflow 2.0. PaperSave does not support importing a workflow 1.0 design into Workflow 2.0 and vice versa.

## Saving Workflow to File

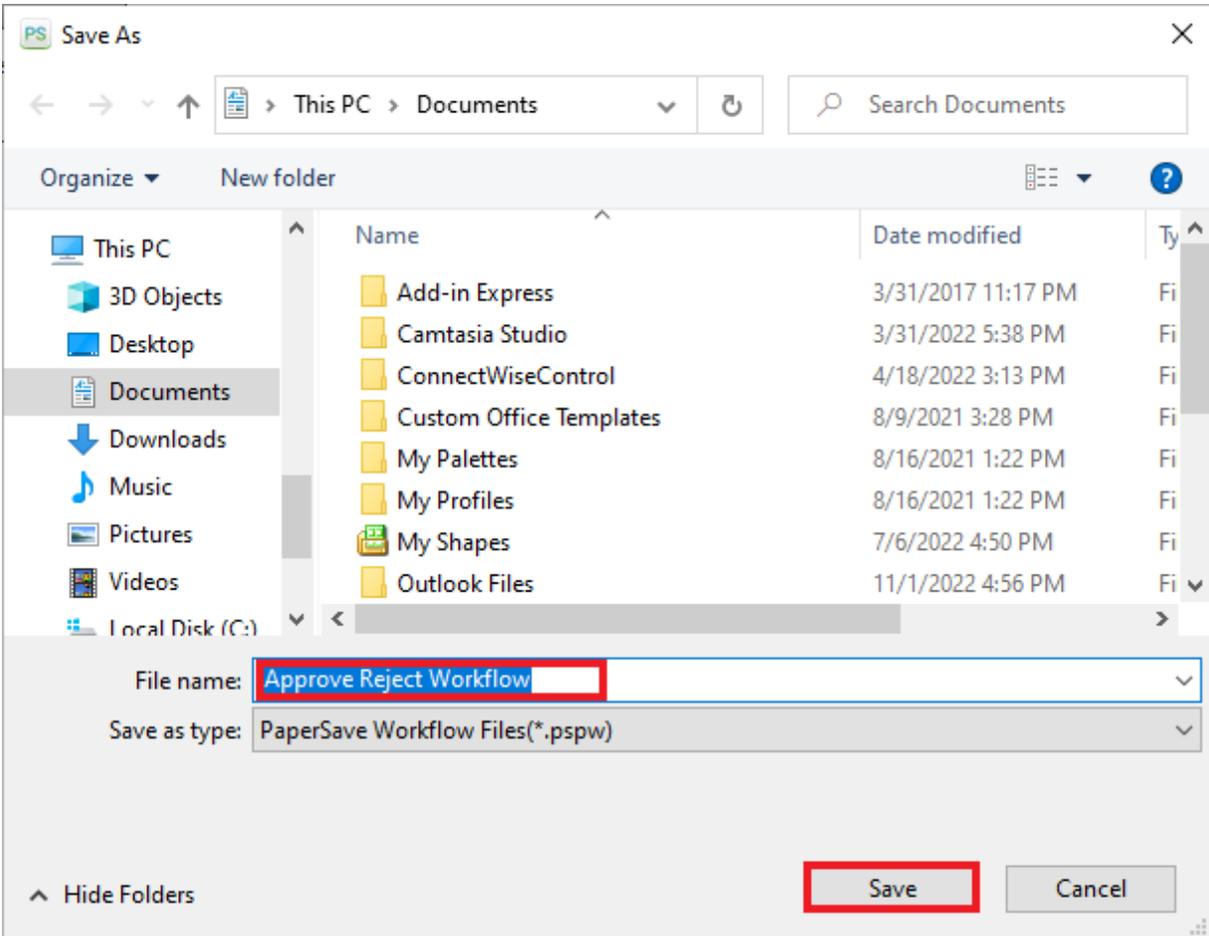
Saving a Workflow to a File allows you to save the Workflow that you can import later to use in another document type.

To save a workflow to a file, do the following:

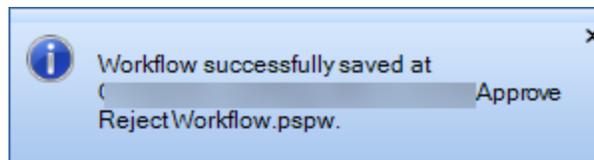
- 1) Click on the **Saving Workflow to File** icon. This will open File Explorer.



- 2) Enter the name of the workflow and click on the **Save** button.



3) A confirmation message is displayed, as shown in the below image.



## Closing Designer

To close the workflow designer, click on the **Close Designer** icon from the toolbar option.



## Managing the Workflows

Watch the [video](#) to know how to manage the Workflows.

The following are the topics covered in this sections:

- [Workflow Fields](#)
- [Workflow Forms](#)
- [Workflow Quick Measures](#)
- [Deleting a Workflow](#)

## Workflow Fields

PaperSave allows you to create Workflow specific profile fields. Workflow Fields work exactly as Document Type profile fields, with the exception that the field data are only visible for Workflow items specific to a Workflow. When a Workflow item is associated with a record in the Integrated Application, then the document that is created from that association does not contain the Workflow Fields. This facilitates Workflow designers to define fields that are only relevant while a document is into a Workflow.

1) To add or access Workflows Fields, open an existing Workflow and scroll down to the Fields section as shown in the below screenshot.

The screenshot shows the configuration interface for a workflow named 'DM RE Gift AutoEntry'. The 'Fields' section is active, displaying a table of field configurations. The '+ ADD' button is highlighted with a red box. Below the table is a 'Drop Points' section with its own configuration table.

Field Name	Description	Type	Display Type	Default Value	Required	Data Connected
<input type="checkbox"/> ConstituentID	ConstituentID	String	Text Box		Yes	No
<input type="checkbox"/> Gift Amount	Gift Amount	Number	Text Box		Yes	No
<input type="checkbox"/> Gift Date	Gift Date	Date	Date Box		Yes	No
<input type="checkbox"/> GiftType	GiftType	String	Drop Down List	Cash	Yes	No
<input type="checkbox"/> Fund ID	Fund ID	String	Text Box		No	No
<input type="checkbox"/> Campaign ID	Campaign ID	String	Text Box		No	No
<input type="checkbox"/> Appeal	Appeal	String	Text Box		No	No
<input type="checkbox"/> Package	Package	String	Text Box		No	No
<input type="checkbox"/> Solicitor	Solicitor Information	Table	Data Grid		No	No
<input type="checkbox"/> Company	this profile fields contains list of CompanyName and its db name as field value	String	Drop Down List		Yes	No

Drop Point Name	Drop Point Type	Separator Type
<input type="checkbox"/> DM RE Gift AutoEntry - Incoming items	User Initiated	None

2) Watch the [video](#) to know how to add and manage the Workflow Fields.

The following topic is covered within Workflow Fields section:

- [Set Field Order](#)

## **Set Field Order**

Watch the [video](#) to know how to set the desired order of the Workflow Fields.

## **Understanding Smart Forms**

PaperSave Smart Forms provide you with the ability to generate workflow items by filling fields out in a friendly layout designed by workflow administrator. The forms can be accessed by internal users in your organization as well as the external users such as vendors, resellers, distributors, etc. who need to submit invoices, bill, or any other document by filling in the necessary details.

PaperSave enables Workflow administrator to design forms and open in the preview mode so that changes can be made in the design on the go and verified at the same time.

PaperSave facilitates creating Smart Forms with different output types such as pdf & docx. Once the user submits a Smart Form with output type as PDF, it creates a Workflow item (extension .docx.) based on the design of the smart form.

Similarly, PaperSave offers you to design a Smart Form with output type as Word Mail Merge where you can upload pre-defined Word templates. Once the user submits a Smart Form with output type as Mail Merge, it combines the data inputs submitted from the Smart Form design with the defined Word template (extension .docx.) This is typically useful for the documents such as agreement, contracts, etc where different users can submit their details in the smart form and it is further merged with the pre-defined Word Template, resulting in Workflow item with .docx extension.

A standard Smart Form appears as shown in the below screen where users can fill in the details and submit as a Workflow item:

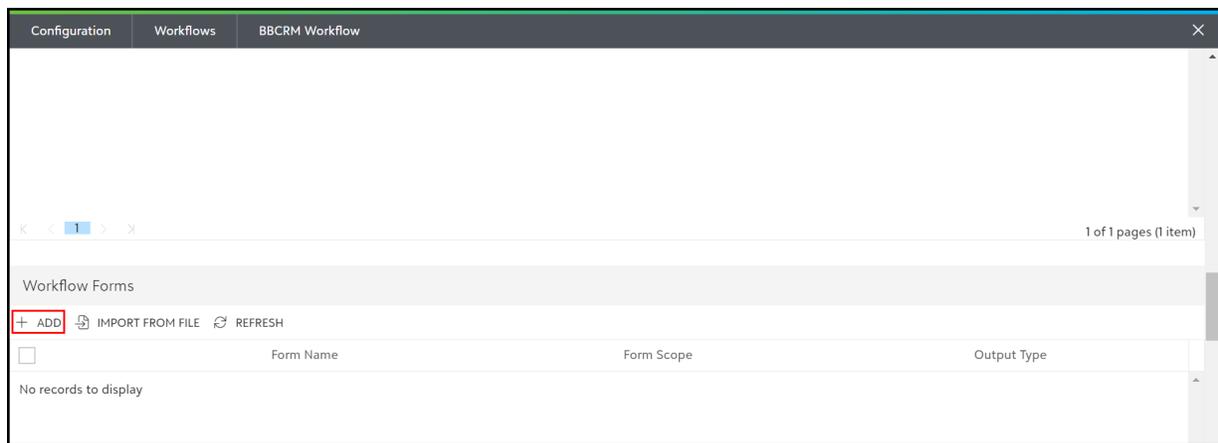
The screenshot shows a web application interface for a 'Donation Remittance Form'. The top navigation bar includes a menu icon, the title 'Some University Donation Remittance', and a 'Submit' button with various icons. A user profile for 'Vrunda Bhalani' is visible in the top right. The left sidebar contains two menu items: '\$ Donation' and '\$ Source'. The main content area features a large title 'Donation Remittance Form' and a placeholder image. Below the title, there is a section for 'Development and Alumni Engagement' with the address '1010-1234 University Blvd. Some College Town, FL 33123'. A 'Form Instruction' states: 'Please ensure that all supporting materials are attached.' To the right, there is an 'Executive Director Approval' section with a large empty text box. The 'Donation Details' section contains several input fields: 'Donor' (with a search icon), 'Date', 'Type Code' (with a dropdown menu showing '1'), 'Constituent ID' (with a search icon), 'Designation' (with a search icon), and 'Amount \$' (with a value of '\$ 0.00'). At the bottom, there are two sections: 'Attributes' with checkboxes for 'Anonymous Gift' and 'Sponsorship', and 'Acknowledgement' with radio buttons for 'Tax Receipt', 'External Award Acknowledgement', 'Business Acknowledgement', and 'None'.

**Note:** The terms "**Smart Forms**" and "**Workflow Forms**" are used interchangeably in the User Guide. However, the reference to both has the same meaning.

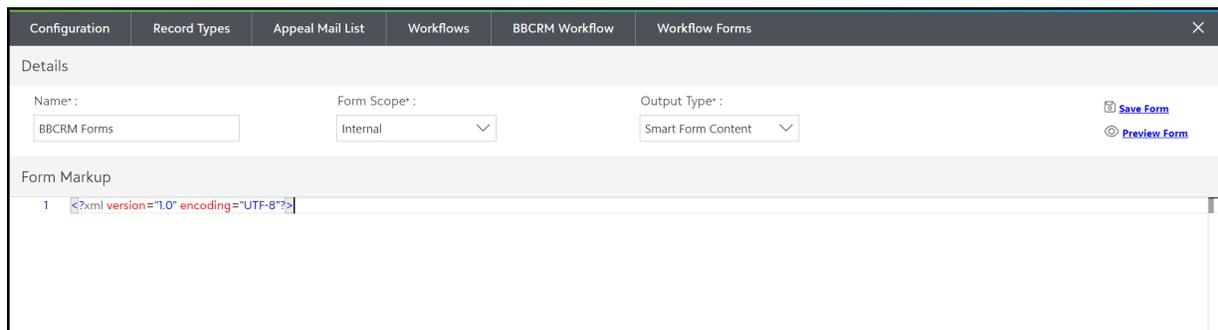
## Creating Smart Forms

Follow the below steps to create a Smart Form:

- 1) To add or access a Smart Form, click on the desired Workflow to open it in the edit mode.
- 2) Now, scroll down to the **Workflow Forms** section and click on **+ADD** to create a new Workflow Form.

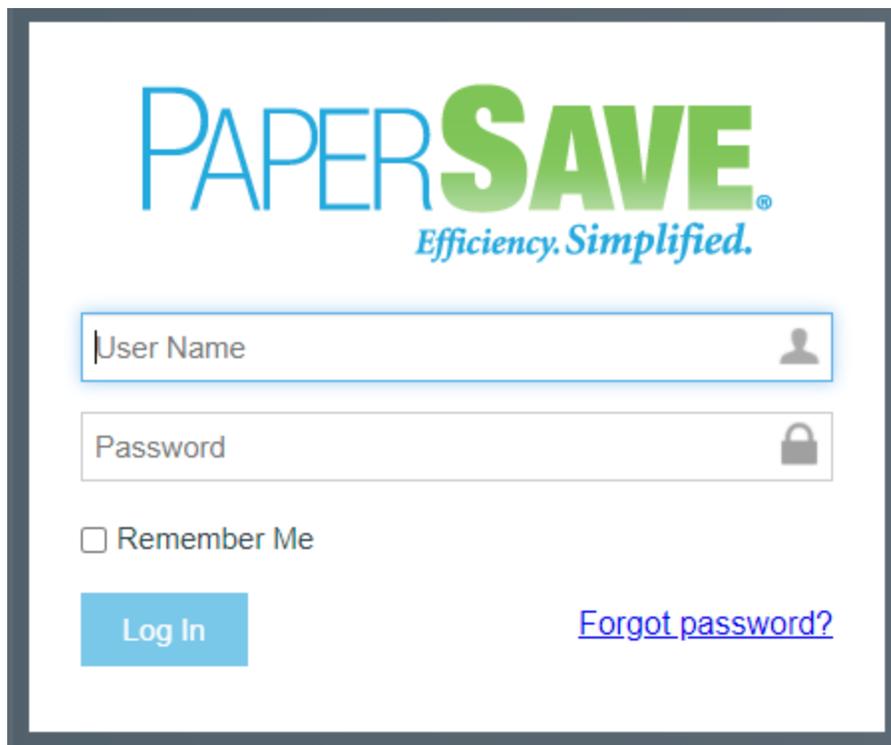


- 3) Now, it navigates you to the following Workflow Forms screen. Enter the required fields in the Details section such as Workflow Form Name, Form Scope and Output Type. Once you have entered the details, you can add/edit the Smart Form script in the Form Markup section.



4) The following is the description of various details required for Smart Form:

- **Name:** Enter the name of the Workflow Form.
- **Form Scope:** Select the Form Scope from the given options in the drop-down list as described below.
  - Choose **Internal** to give the form access within the organization. This will require users to log in using their credentials before they can access the form, as shown in the below screen.



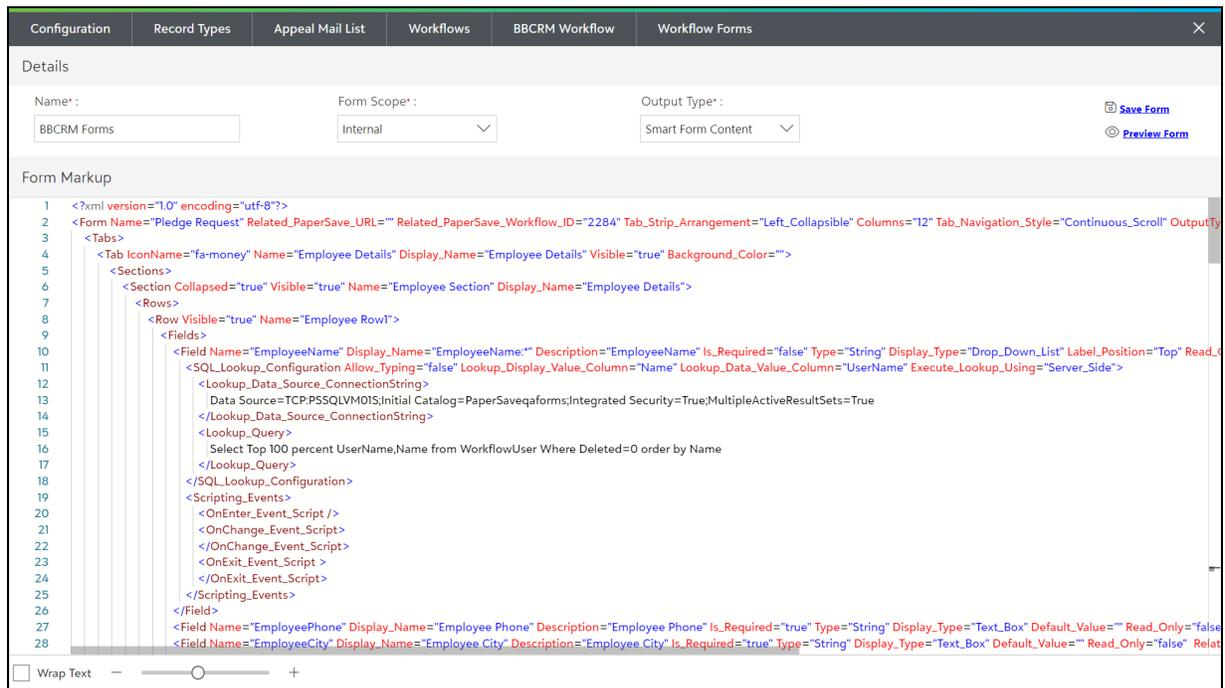
The screenshot displays the PaperSave login page. At the top, the logo reads "PAPER SAVE" in blue and green, with the tagline "Efficiency. Simplified." below it. The login form consists of two input fields: "User Name" with a person icon on the right, and "Password" with a lock icon on the right. Below these fields is a checkbox labeled "Remember Me". At the bottom left is a blue "Log In" button, and at the bottom right is a blue hyperlink labeled "Forgot password?".

- Choose **Public** to give the form access to the users outside the organization.
- Choose **Both** to give access to the internal and external users.

- **Output Type:** Select an appropriate Output Type from the dropdown list.
  - Choose **Smart Form** content when the smart form output should be a pdf generated from the smart form design.
  - Choose **Word Mail Merge** when the smart form output should be a word template(.docx) which populates the field values submitted via the smart form (based on the smart form design).

5) Enter the XML code for the Smart Form in the Form Markup section.

**Tip:** Click [here](#) to get the latest XSD file from which XML can be generated using any external tool.



6) Click on **Preview form** to view the HTML version of the form based on the code entered in XML. Preview form will validate if there is an error in the XML. The preview form will display how the form will appear to the user as shown below:

Some University Donation Remittance

Submit

Vrunda Bhalani

Donation

Source

# Donation Remittance Form

**Development and Alumni Engagement**  
1010-1234 University Blvd.  
Some College Town, FL 33123

**Executive Director Approval:**

**Form Instruction:**  
Please ensure that all supporting materials are attached.

**Donation Details**

**Donor**

**Constituent ID**

**Amount \$**

**Date**

**Type Code**

**Designation**

**Attributes**

Anonymous Gift

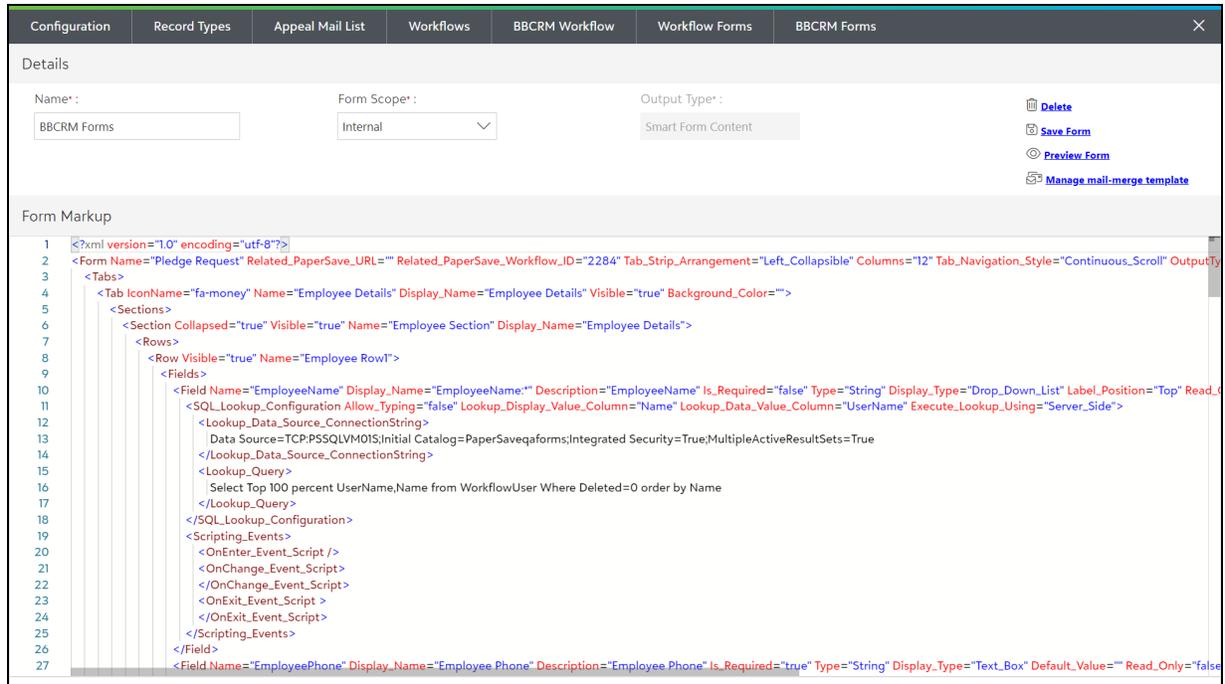
Sponsorship

**Acknowledgement**

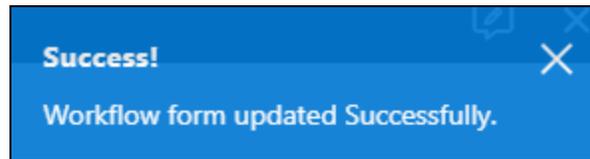
Tax Receipt  External Award Acknowledgement  Business Acknowledgement  None

**Warning:** You must include the attributes "**Related\_PaperSave\_URL**" and "**Related\_PaperSave\_Workflow\_ID**" in the form markup section as shown in the below screenshot.

For Example - If you do not include Related\_PaperSave\_Workflow\_ID in the form markup, and click on **Preview Form**, then it will show an error message titled "The required attribute 'Related\_PaperSave\_Workflow\_ID' is missing" as shown in the below screen:



7) Click on **Save Form** to create a smart form for the selected Workflow. Now, you will see a success notification in the top right corner of the screen as shown below.

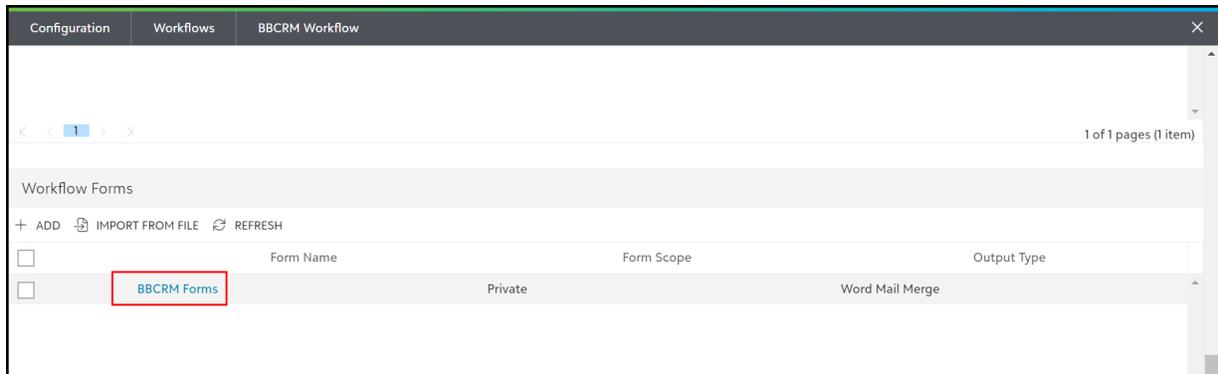


## Managing Smart Forms

You can manage (edit or delete) the existing Smart Forms from the respective Workflows. Follow the below steps to manage the Smart forms:

1) Navigate to **Workflows** tile within "Workflow & Automation" section in the Configuration Area. Click on **Workflows** to view the current list of Workflows.

2) Click on the desired Workflow to open it in the edit mode. Now, scroll down to the **Workflow Forms** section as shown in the below screen.

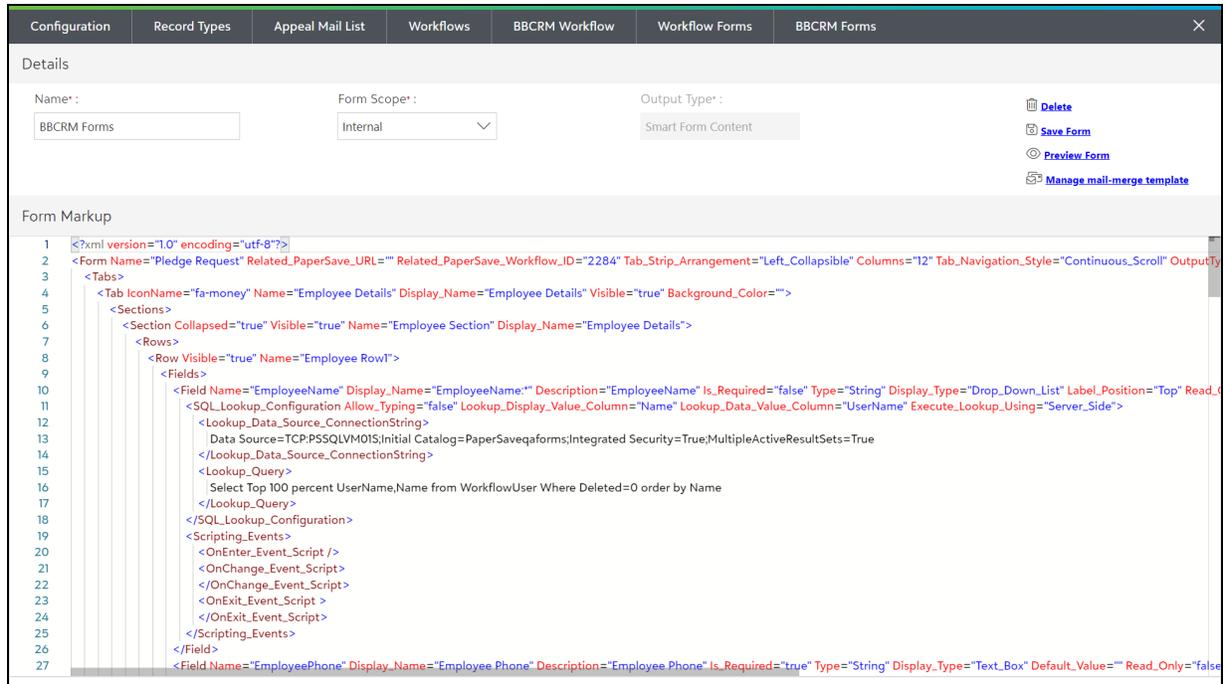


### List Toolbar options in Workflow Forms

The following are the Toolbar options available in Workflow Forms:

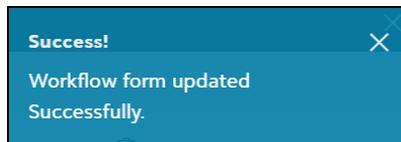
- **+ADD**: Click on **+ADD** to create a new Smart Form.
- **IMPORT FROM FILE** (COMING SOON): Click on this option to import Smart Form from another file.
- **REFRESH**: Click on **REFRESH** to see the latest changes in the Workflow forms list.

3) Click on the Workflow Form name to open it in the edit mode, as shown in the below screen.



4) You can edit the smart form details such as Name and Form Scope. Besides, you can edit the Form Markup to see desired changes in the design.

- Click on "**Preview Form**" to see the changes in the form UI.
- Click on **Save Form** once you are done editing the Smart Form. You will see a success notification titled "Workflow form updated successfully" in the top-right corner of the screen.



5) If the output Type of Smart form is **Word Mail Merge**, then the smart form when opened in the edit mode will appear as shown in the below screen. You will see an additional option "Manage mail-merge template" in the Details section below "Preview Form" option where you can either choose to create a new mail merge template or manage the uploaded template.

The screenshot displays the configuration window for 'BBCRM Forms'. The top navigation bar includes tabs for Configuration, Record Types, Appeal Mail List, Workflows, BBCRM Workflow, Workflow Forms, and BBCRM Forms. The 'Details' section shows the form name as 'BBCRM Forms', the form scope as 'Internal', and the output type as 'Smart Form Content'. Action buttons for 'Delete', 'Save Form', 'Preview Form', and 'Manage mail-merge template' are visible. The 'Form Markup' section shows the XML code for the form, including a tab for 'Employee Details' with a collapsed section and a row containing a dropdown menu for 'EmployeeName' and a text box for 'EmployeePhone'.

6) Click on "**Manage mail merge template**" to navigate to the Mail Merge Template dialog as shown in the below screen. Click on **+ADD** to create a mail merge template. Enter the Name, Description, and upload a word template from your file explorer. Click on **Add** to finish creating a new template.

Mail Merge Template ✕

Add Mail Merge Template ✕

Name\* :

Description\* :

Choose Template File :  ...

< < 1 > > 10 ▾ 1 of 1 pages (2 items)

- Also, if there is an existing Mail merge template, click on the template to open in the edit mode.

Mail Merge Template ✕

[+ ADD](#) [📖 CHOOSE FIELDS](#) [📄 EXPORT TO EXCEL](#) [🔄 REFRESH](#)

<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	Donation template	Donation template
<input type="checkbox"/>	Gift form	Gift for MailMerge

⏪ < 1 > ⏩ 10 ▾ 1 of 1 pages (2 items)

- You can edit name and description of the mail merge template. Also, you can upload an updated word template from your file explorer and click on **Add** to update, if required.

Mail Merge Template

Edit Mail Merge Template

Name\* :  
Donation template

Description\* :  
Donation template

Choose Template File :  
...  
Add

1 10 1 of 1 pages (2 items)

- Once you are done making changes to the Smart form, Click on **Save Form** to save the changes. You will see a success notification titled "**Workflow form updated successfully**" in the top-right corner of the screen.

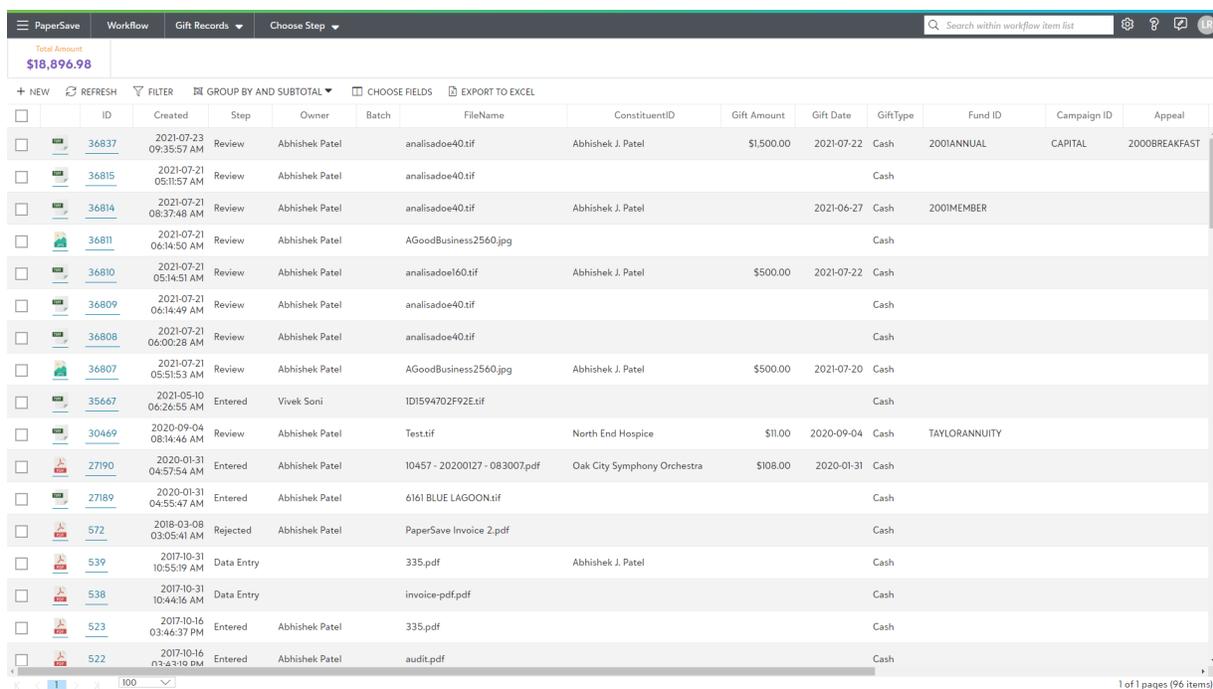
**Note:** Click [here](#) to learn more about Smart forms, including how to access them, view submitted forms in Workflow, and modify values for submitted forms.

## Workflow Quick Measure

Workflow Quick Measure enables you to show various calculations or information about items based on selected fields when viewing the Workflow item list.

You can select aggregate functions such as "Sum", "Minimum/Maximum", "Top1", "Average", and "Count" to perform calculations on selected Workflow/Document type fields.

The results will be displayed for the specified Workflow under the application bar in the Workflow item list, as shown in the below screen:



ID	Created	Step	Owner	Batch	FileName	ConstituentID	Gift Amount	Gift Date	GiftType	Fund ID	Campaign ID	Appeal
36837	2021-07-23 09:35:57 AM	Review	Abhishek Patel		analsad0e40.tif	Abhishek J. Patel	\$1500.00	2021-07-22	Cash	2001ANNUAL	CAPITAL	2000BREAKFAST
36815	2021-07-21 05:11:57 AM	Review	Abhishek Patel		analsad0e40.tif				Cash			
36814	2021-07-21 08:37:48 AM	Review	Abhishek Patel		analsad0e40.tif	Abhishek J. Patel		2021-06-27	Cash	2001MEMBER		
36811	2021-07-21 06:14:50 AM	Review	Abhishek Patel		AGoodBusiness2560.jpg				Cash			
36810	2021-07-21 05:14:51 AM	Review	Abhishek Patel		analsad0e160.tif	Abhishek J. Patel	\$500.00	2021-07-22	Cash			
36809	2021-07-21 06:14:49 AM	Review	Abhishek Patel		analsad0e40.tif				Cash			
36808	2021-07-21 06:00:28 AM	Review	Abhishek Patel		analsad0e40.tif				Cash			
36807	2021-07-21 05:51:53 AM	Review	Abhishek Patel		AGoodBusiness2560.jpg	Abhishek J. Patel	\$500.00	2021-07-20	Cash			
35667	2021-05-10 06:26:55 AM	Entered	Vivek Soni		1D1594702F92E.tif				Cash			
30469	2020-09-04 08:14:46 AM	Review	Abhishek Patel		Test.tif	North End Hospice	\$11.00	2020-09-04	Cash	TAYLORANNUITY		
27190	2020-01-31 04:57:54 AM	Entered	Abhishek Patel		10457 - 20200127 - 083007.pdf	Oak City Symphony Orchestra	\$108.00	2020-01-31	Cash			
27189	2020-01-31 04:55:47 AM	Entered	Abhishek Patel		6161 BLUE LAGOON.tif				Cash			
572	2018-03-08 03:05:41 AM	Rejected	Abhishek Patel		PaperSave Invoice 2.pdf				Cash			
539	2017-10-31 10:55:19 AM	Data Entry			335.pdf	Abhishek J. Patel			Cash			
538	2017-10-31 10:44:16 AM	Data Entry			invoice-pdf.pdf				Cash			
523	2017-10-16 03:46:37 PM	Entered	Abhishek Patel		335.pdf				Cash			
522	2017-10-16 03:43:10 PM	Entered	Abhishek Patel		audit.pdf				Cash			

To learn how to add, manage and delete the Workflow Quick Measures, see the following sections:

- [Adding a Workflow Quick Measure](#)
- [Managing a Workflow Quick Measure](#)
- [Deleting Workflow Quick Measure](#)

## Adding Workflow Quick Measure

You can perform specific calculations on the Workflow and Document Type fields by adding Workflow Quick Measures for the selected Workflow.

Watch the [video](#) to know the steps to add the Workflow Quick Measure.

Following are the steps to add a Workflow Quick Measure:

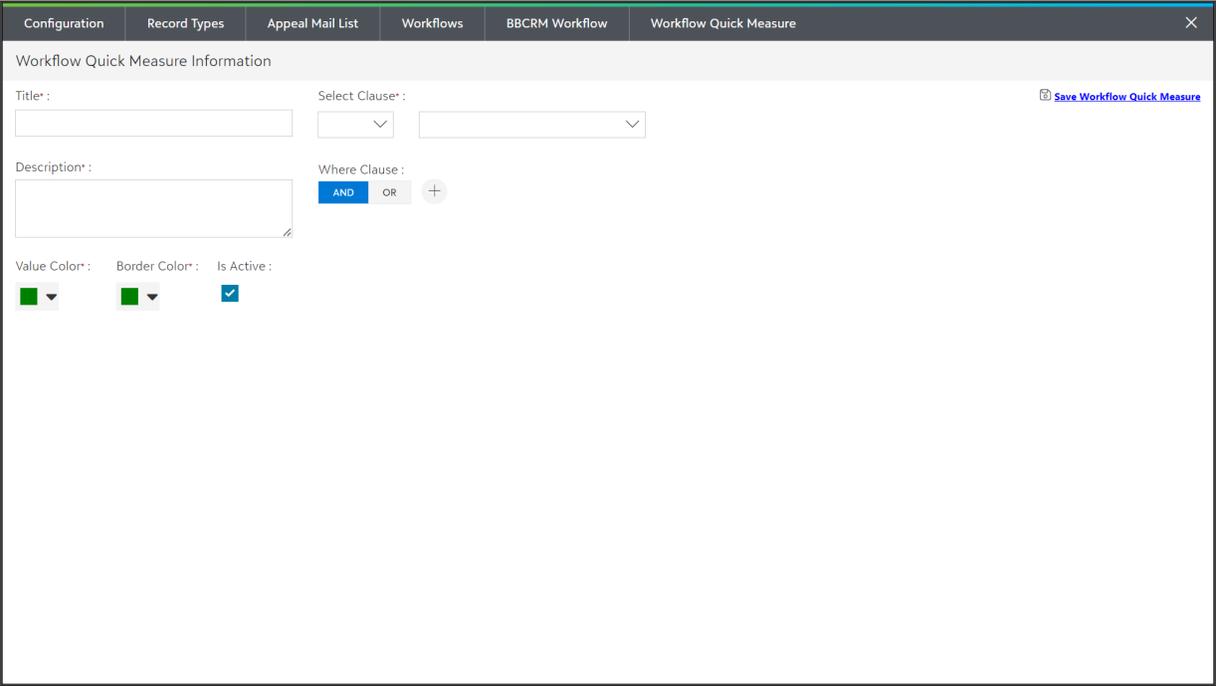
- 1) Click on **Workflows** tile in the Workflow & Automation section of the Configuration Area.
- 2) Select your desired workflow from the list and scroll down to the Workflow Quick Measure section, as shown in the below screen.



3) Click on the “+ADD” option from the list toolbar, as shown in the below screen.



4) Now, enter all the required details.



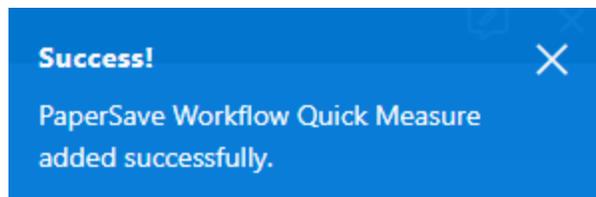
- **Title:** Enter the text to be displayed as the name of the Quick Measure above the list toolbar of the Workflow item list.
- **Description:** Enter the description to provide more information to display it when hovered over the Workflow Quick Measure title.
- **Value Color:** Select the color to be set for the Quick Measure output.
- **Border Color:** Select the color to be set for the title.
- **Is Active:** You can check/uncheck this option to control the display of the Quick Measure in the Workflow area. By default, this option is checked.
- **Select Clause:** Select the aggregate function (i.e., sum, count, min, etc.) and field from the drop-down lists to get the output accordingly.

**Example:** If you select aggregate function as **SUM** and Field = **Amount**, then the output will show the total of the amount field values.

The available Aggregate functions are as follow:

<b>TOP1</b>	This function returns the 1st value in the list for the selected field.
<b>SUM</b>	This function gives the sum of the values in the selected field.
<b>AVG</b>	This function calculates and returns the average value of the selected numeric field.
<b>MIN</b>	This function returns the minimum value of the selected field. <b>Note:</b> If the selected field contains alpha characters, then it will return the smallest, that is, A is smaller than C.
<b>MAX</b>	This function returns the maximum value of the selected field. <b>Note:</b> If the selected field contains alpha characters, then it will return the greatest, that is, C is greater than A.
<b>COUNT</b>	This function returns the total number of rows with the values in the selected field.

5) Click on the **Save Workflow Quick Measure** option to save the newly created Workflow Quick Measure and it will prompt the success/failure notification as shown in the following screenshot.

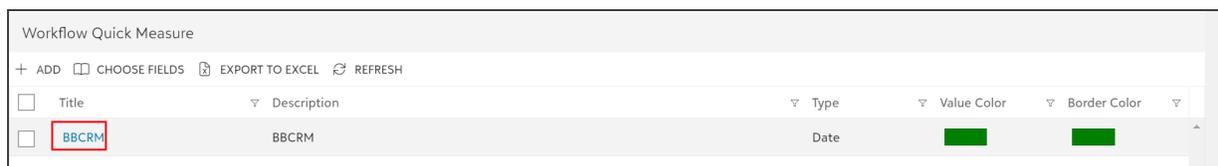


## Managing a Workflow Quick Measure

Watch the [video](#) to know how to manage the Workflow Quick Measure.

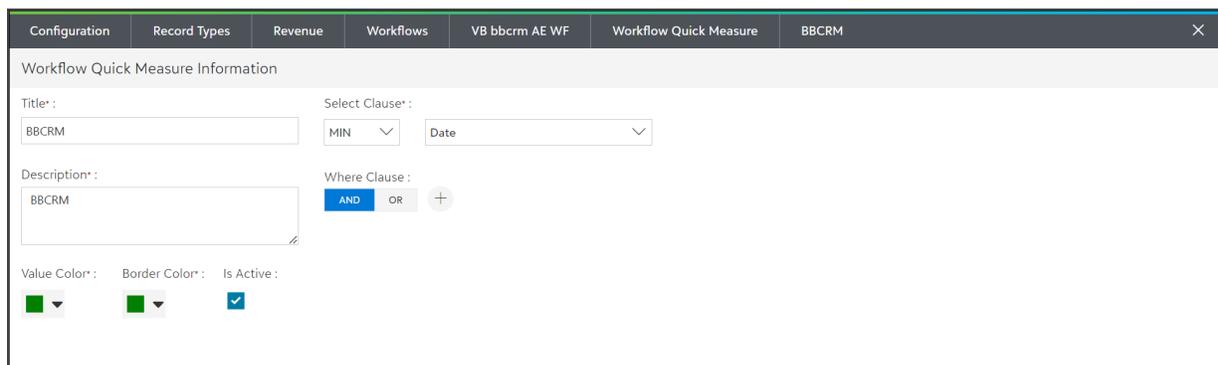
You can also follow the below steps to manage a Workflow Quick Measure:

- 1) Click on **Workflows** tile in the Workflow & Automation section of the Configuration Area.
- 2) Select your desired workflow from the list and scroll down to the Workflow Quick Measure section, as shown in the below screen.



<input type="checkbox"/>	Title	Description	Type	Value Color	Border Color
<input type="checkbox"/>	<a href="#">BBCRM</a>	BBCRM	Date	Green	Green

- 3) Now, click on the Title (hyperlink) of an existing Workflow Quick Measure to open it in edit mode, as shown in the below screen.



Configuration | Record Types | Revenue | Workflows | VB bbcrm AE WF | Workflow Quick Measure | BBCRM

Workflow Quick Measure Information

Title:

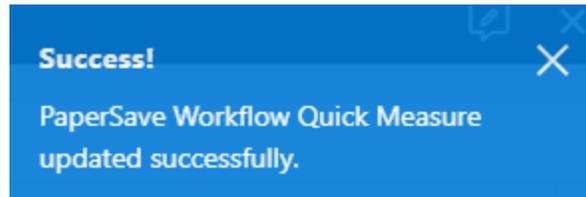
Select Clause:

Description:

Where Clause:

Value Color:  Border Color:  Is Active:

- 4) To save the changes, you can click on the **"X"** in the upper right corner, press the **Esc** key on the keyboard, or click on the **Workflow Quick Measure** from the breadcrumbs available in application bar.
- 5) After updating, it will show the success/failure message on the top-right corner of the screen, as shown below.



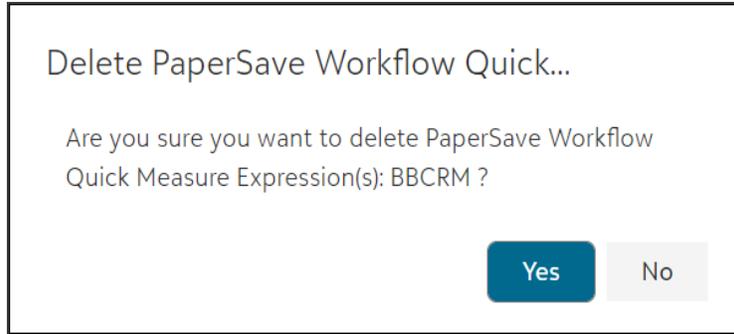
## Deleting Workflow Quick Measure

Follow the below steps to delete the Workflow Quick Measure:

- 1) Click on **Workflows** tile in the Workflow & Automation section of the Configuration Area.
- 2) Select your desired Workflow from the list and scroll down to the Workflow Quick Measure section, as shown in the below screen.

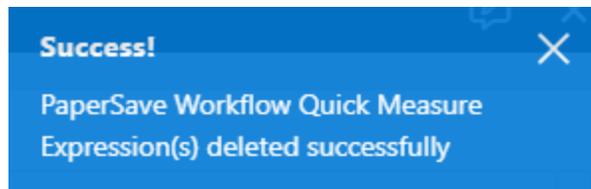


- 3) Now, select the existing Workflow Quick Measure(s) using the checkbox or directly clicking on the row(s) and then click on the **Delete** option from the slide-up panel as shown in the below screen.
- 4) Once you click on the Delete option, a confirmation dialog box pops up as shown in the below screen.



5) You can now click on **Yes** if you want to delete the selected Quick Measure or click on **No** to cancel the delete operation.

6) On deletion, it will show the success/failure message on the top-right corner of the screen, as shown below.



## Deleting a Workflow

You can delete the Workflow by using the following steps:

1) Open any existing Workflow and click on the **Delete Workflow** button within the full-page dialog box as shown in the below screen.

Configuration Workflows BBCRM Workflow

Details

Name: BBCRM Workflow

Record Type: Appeal Mail List

Stack Size: 10

Document Type: Appeal Mail List Documentation

Host Application: Blackbaud Enterprise CRM

Published: No

Module: Records

Design Workflow

Delete Workflow

Security

Groups/Users allowed to submit workflow items :

Groups/Users that are administrators of the workflow :

Groups/Users that can edit item content into this workflow :

Groups/Users that can permanently modify workflow item content by applying a signature :

Groups/Users that can view items in the workflow that they do not own :

Groups/Users allowed to delete workflow items :

Groups/Users that are allowed to move items from this workflow to another workflow :

Groups/Users that are allowed to move items from another workflow to this workflow :

Groups/Users that can view into the completed step in the workflow :

2) On clicking the **Delete Workflow** option, a dialog box will pop up. You must provide the appropriate reason to delete the Workflow and then, click on **Confirm Delete** option, as shown in the below screen.

Delete Workflow

Selected Workflow:

- BBCRM Workflow

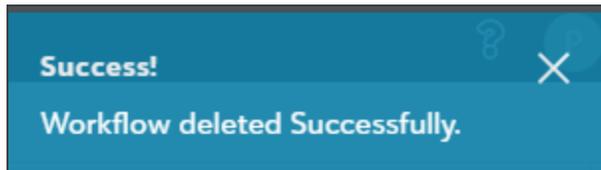
Are you sure want to Delete Workflow : BBCRM Workflow?

Please provide the reason for the change:

Not Required

Confirm Delete Cancel

3) You will see a message notification (in the top right corner of the screen) based on the success/failure of the delete operation.



**Note:** PaperSave includes the reason for the deletion of a Workflow in the audit log.

## Workflow Drop Points

The following topics are covered in Workflow Drop Point section:

- [Adding Email Box Drop Point](#)
- [Adding User Initiated Drop Point](#)
- [Managing Workflow Drop Point](#)

## Adding Email Box Drop Point

The following are the two ways of creating of Email Box Drop Point:

- [Creating an Email Type Drop point for IMAP or POP](#)
- [Creating an Email Type Drop point for Microsoft 365 or Outlook](#)

## Creating an Email Type Drop point for IMAP or POP

Watch the [video](#) to know how to create an Email Type Drop Point for IMAP or POP Mail Server Type.

## Creating an Email Type Drop point for Microsoft 365 or Outlook

When creating an Email Type Drop Point with Mail Server Type as Microsoft 365 or Outlook, the following steps within Admin Access section are a pre-requisite, where one-time Admin access enables other users to grant email box consent to third-party apps such as PaperSave.

The following are the OAuth Mail server types supported in PaperSave:

- **Microsoft 365 (IMAP-OAuth) and Outlook(IMAP-OAuth):** Allows connecting to Microsoft 365 and Outlook and processing the emails using IMAP OAuth.

- **Microsoft 365 (EWS-OAuth):** Allows connecting to Microsoft 365 and processing the emails using EWS OAuth.

## Admin Access – Microsoft 365/Outlook Email Box Consent for Third Party Apps

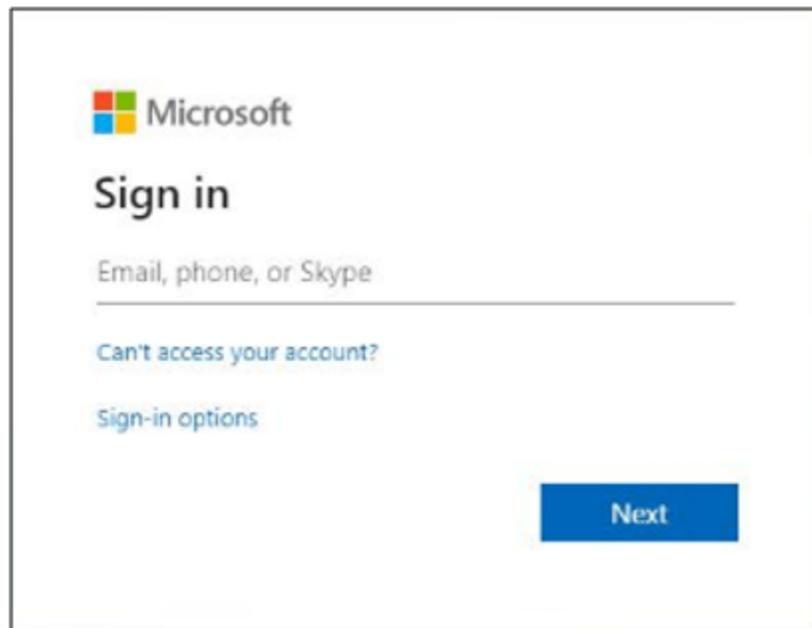
1) To allow PaperSave to read a Microsoft 365 or Outlook mailbox, a user with Global Admin rights in your Organization's Active Directory must grant one-time Admin access.

2) The following is an example of an Admin consent URL. Click [here](#) for more details on Admin consent URL.

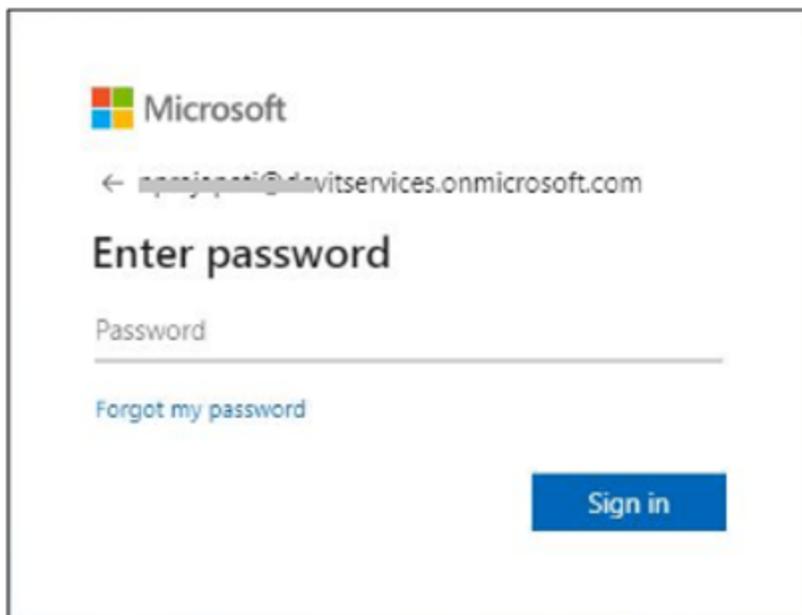
[https://login.microsoftonline.com/tenant-id/adminconsent?client\\_id=cc3de383-ba86-4c8c-b515-afb4ec4fd175](https://login.microsoftonline.com/tenant-id/adminconsent?client_id=cc3de383-ba86-4c8c-b515-afb4ec4fd175)

where **tenant-id** is your Organization's Active Directory ID.

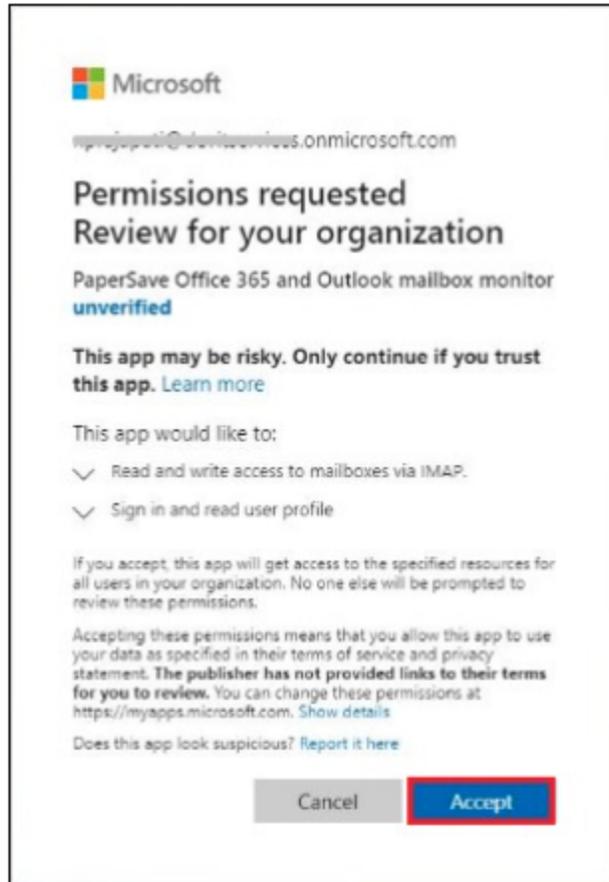
3) Enter the **respective tenant ID** in the above URL and access the URL in the browser. You will see a prompt. Enter the log in credentials (Global Admin) and click on **Next** to proceed as shown in the below screen.



4) Enter the **password** and click on **Sign in** to proceed as shown in the below screen.



5) Now, you (Global Admin user) will see a prompt titled "**Permissions requested Review for your organization**" to grant the required permissions to the "**PaperSave Office 365 and Outlook mailbox monitor**" as shown in the below screen. Click on **Accept** to finish the Admin consent process.



## Steps to create an Email Box Type Drop Point with Mail Server Type of Microsoft 365 or Outlook

Once the user having Global Admin rights in Active Directory has provided access to connect Microsoft 365 or Outlook with PaperSave, the following steps should be performed by the PaperSave users who are responsible for creating Email type Drop Point with Mail Server Type of Microsoft 365 or Outlook:

- 1) Navigate to the PaperSave **Configuration Area** and click **Workflow Drop Points** tile in **Workflow & Automation** section.
- 2) Workflow Drop Points screen appears from where click on **+ADD** to create a new drop point.

PaperSave Configuration Workflow Drop Points				
+ ADD CHOOSE FIELDS EXPORT TO EXCEL REFRESH				
<input type="checkbox"/>	Drop Point Name	Workflow Name	Drop Point Type	Separator Type
<input type="checkbox"/>	EMAIL DROP POINT WITH Canadian checks CHECKS	PS BBCRM Auto Entry Workflow	Email Box	Retrieve Attachments Merging Tiffs/PDFs into Individual Items
<input type="checkbox"/>	EMAIL DROP POINT WITH US CHECKS	PS BBCRM Auto Entry Workflow	Email Box	Retrieve Attachments As Individual Items
<input type="checkbox"/>	IMAP Drop Point	QA Smoke RENXT Gift AutoEntry SKY API	Email Box	Retrieve Attachments As Individual Items
<input type="checkbox"/>	Microsoft IMAP outh	QA Smoke RENXT Gift AutoEntry SKY API	Email Box	Retrieve Attachments As Individual Items
<input type="checkbox"/>	Outlook IMAP	QA Smoke RENXT Gift AutoEntry SKY API	Email Box	Retrieve Email And Attachments As Individual Items
<input type="checkbox"/>	POP Drop Point	QA Smoke RENXT Gift AutoEntry SKY API	Email Box	Retrieve whole Email as Individual Item
<input type="checkbox"/>	imap-uat	NS GP Invoice Email Notification with OnEnter	Email Box	Retrieve Attachments As Individual Items
<input type="checkbox"/>	RS EMail DP	NS GP Invoice Email Notification with OnEnter	Email Box	Retrieve whole Email as Individual Item
<input type="checkbox"/>	Test Drop Point	QA GP Invoice AutoEntry Smoke Test	Email Box	Retrieve Attachments As Individual Items
<input type="checkbox"/>	DM O365 Individual	DM GP 2 Way Match Swift	Email Box	Retrieve Attachments As Individual Items

1 of 1 pages (10 items)

5) Enter the following Drop Point details:

- Enter the **Name** of the Drop point.
- Select type as **Email Box**.
- Select the desired **Separator Type**.
- Set an option from **Workflow Item filename for Attachments using** dropdown.
- Select the desired **Workflow**.
- Select **Outlook.com** or **Microsoft 365** as the Mail Server Type based on your organization's mail client.

6) Click on the **Grant Access** button to the right of the Mail Server Type as shown in the below screen.

Configuration Workflow Drop Points

Details

Name:

Type:

Separator Type:

Set Workflow Item Filename for Attachments u...

Workflow Name:

Mail Server Type:  [Grant Access](#)

OCR:

Before Fields On Load Script:  [Edit Script](#)

Save Drop Point

Email account who granted access:

Email folder to watch:

Forwarding Email Address:

Move eMail to a "Processed" subfolder in the

7) Now, you will see the Microsoft login prompt. Enter your eMail address and click on **Next** to proceed.

 Microsoft

## Sign in

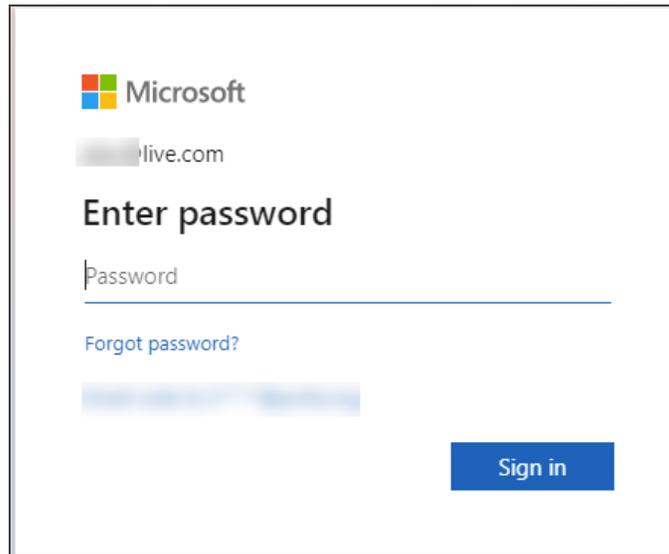
Email, phone, or Skype

No account? [Create one!](#)

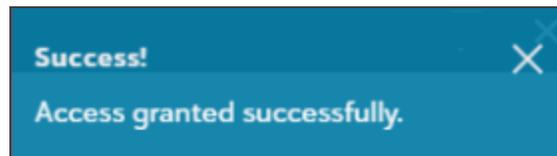
[Can't access your account?](#)

 Sign-in options

8) Enter your password and click on **Sign in** to grant access to your mailbox.



9) Once the login credentials are verified, you will see a success notification titled "**Access granted successfully**" in the top-right corner as shown in the below screen. Now, PaperSave will be able to access the Microsoft 365 or Outlook mailbox for that individual user.



10) The option "**Email account who granted access**" will be auto-filled based on the verified credentials.

11) Select the "**Email Folder to watch**" from the dropdown list.

12) You can enter a "**Forwarding Email Address**" if you want the emails to be forwarded.

13) Check the box to enable the option to "**Move eMail to a Processed subfolder in the eMail account**", if desired.

**Note:** In PaperSaveCloud™, there is no way to create physical folders and save the processed emails as a backup in your local drive, so we highly recommend you select "**Move eMail to a Processed subfolder in the eMail Account**" mentioned under point #13 or provide a Forwarding Email Address mentioned under point #12 so that you will have a backup of the processed emails.

14) When ready, click on the "**Save Drop Point**" in the upper right-hand corner.

## Adding User Initiated Drop Point

Watch the [video](#) to know how to add a User Initiated Drop Point.

**Tip:** We highly recommend you to use **Black and White** scan option as it uses the least amount of disk storage space and yields fastest processing.

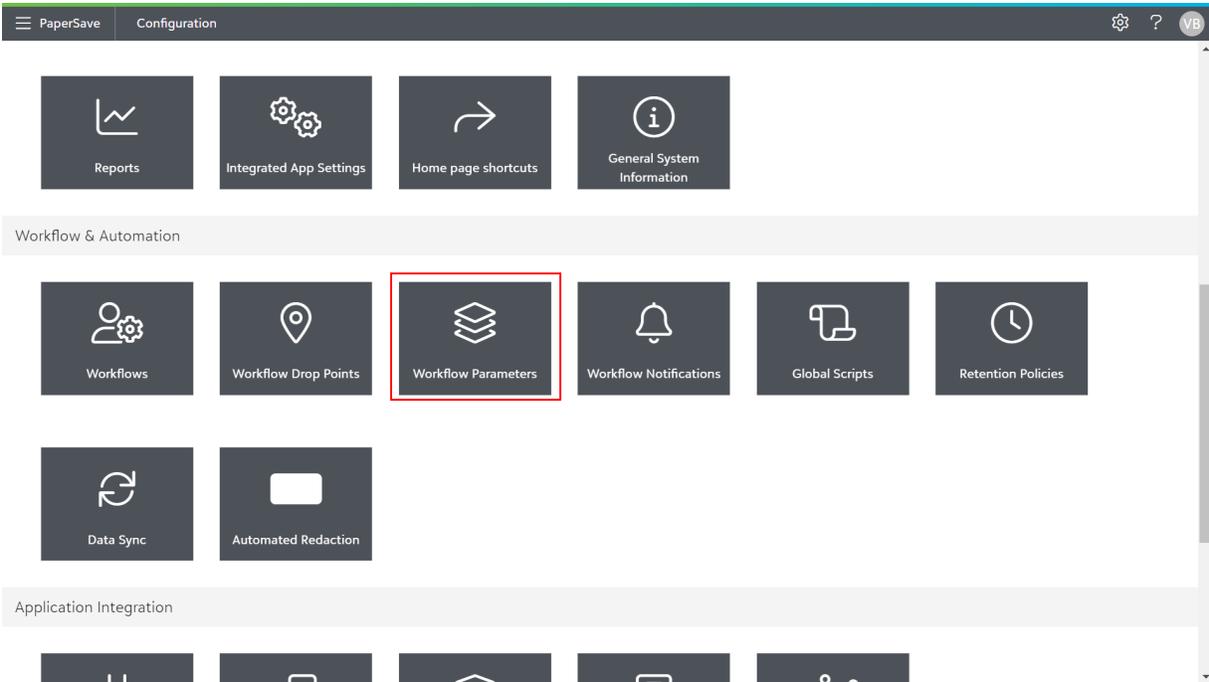
**Note:** The smaller the DPI number, the less sharp the image appears. However, size of the image increases as you increase the DPI number. We recommend that you use 300 DPI.

## Managing Workflow Drop Point

Watch the [video](#) to know how to manage a Workflow Drop Point.

## Workflow Parameters

PaperSave facilitates you to define parameters specific to the Workflow allowing you to set the values in Workflow without un-publishing and editing that Workflow. Workflow Parameters can be accessed from the Workflow & Automation section in the Configuration Area.



The Workflow parameters can be defined from within the specific Workflow. You can set the defaults for Workflow, Workflow Steps, and values for Workflow step for a specific Workflow user.

The following topics are covered in the Workflow Parameters section:

- [Adding Workflow Parameter](#)
- [Managing Workflow Parameter](#)

## Adding Workflow Parameter

PaperSave offers you to define Workflow Parameter in a Workflow and set the default parameter values as explained below:

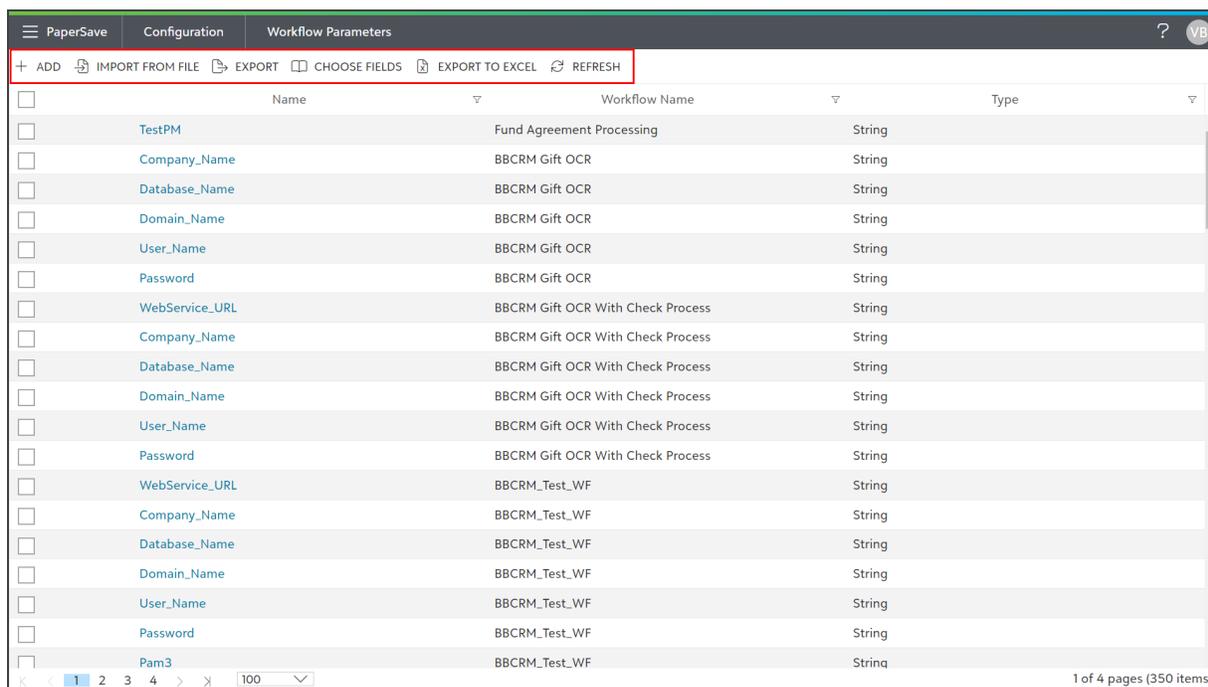
- Set default value for Workflow (**Global default for Workflow**)
- Set default value for each Workflow Step (**Workflow stepwise default**)
- Set the default value for Workflow User for a Workflow Step (**Workflow stepwise default for Workflow user**)

Watch the [video](#) to know how to add a Workflow Parameter.

**Note:** PaperSave will consider the following priority when the default parameter values are defined for Workflow, Workflow Step, and Workflow step for Workflow user:

- 1) Workflow step for Workflow user
- 2) Workflow step value
- 3) Workflow

## List Toolbar options



The screenshot shows the PaperSave interface with the 'Workflow Parameters' tab selected. The toolbar at the top of the list contains the following options: '+ ADD', 'IMPORT FROM FILE', 'EXPORT', 'CHOOSE FIELDS', 'EXPORT TO EXCEL', and 'REFRESH'. Below the toolbar is a table with the following columns: Name, Workflow Name, and Type. The table contains 20 rows of data, each with a checkbox in the first column. The data is as follows:

	Name	Workflow Name	Type
<input type="checkbox"/>	TestPM	Fund Agreement Processing	String
<input type="checkbox"/>	Company_Name	BBCRM Gift OCR	String
<input type="checkbox"/>	Database_Name	BBCRM Gift OCR	String
<input type="checkbox"/>	Domain_Name	BBCRM Gift OCR	String
<input type="checkbox"/>	User_Name	BBCRM Gift OCR	String
<input type="checkbox"/>	Password	BBCRM Gift OCR	String
<input type="checkbox"/>	WebService_URL	BBCRM Gift OCR With Check Process	String
<input type="checkbox"/>	Company_Name	BBCRM Gift OCR With Check Process	String
<input type="checkbox"/>	Database_Name	BBCRM Gift OCR With Check Process	String
<input type="checkbox"/>	Domain_Name	BBCRM Gift OCR With Check Process	String
<input type="checkbox"/>	User_Name	BBCRM Gift OCR With Check Process	String
<input type="checkbox"/>	Password	BBCRM Gift OCR With Check Process	String
<input type="checkbox"/>	WebService_URL	BBCRM_Test_WF	String
<input type="checkbox"/>	Company_Name	BBCRM_Test_WF	String
<input type="checkbox"/>	Database_Name	BBCRM_Test_WF	String
<input type="checkbox"/>	Domain_Name	BBCRM_Test_WF	String
<input type="checkbox"/>	User_Name	BBCRM_Test_WF	String
<input type="checkbox"/>	Password	BBCRM_Test_WF	String
<input type="checkbox"/>	Pam3	BBCRM_Test_WF	String

At the bottom of the table, there is a pagination control showing '1 of 4 pages (350 items)' and a search bar with the value '100'.

PaperSave offers the following options in the List toolbar:

- **+ADD:** This option allows you to add a new Workflow parameter.
- **IMPORT FROM FILE:** This option allows you to import the list of Workflow Parameters from an existing file in the file explorer.
- **EXPORT:** This option allows you to export the list of Workflow Parameters to a file in the file explorer.

- **CHOOSE FIELDS:** You can set desired preferences for the fields to be displayed in the current list using Choose Fields. Learn more about [Choose Fields](#).
- **EXPORT TO EXCEL:** You can export the current list of Workflow parameters to a Microsoft Excel Sheet. Learn more about [Export to Excel](#).
- **REFRESH:** Clicking on **Refresh** updates the recent changes in the Workflow parameter list.

## Managing Workflow Parameter

You can make changes in the Workflow Parameter or change the default values set of Workflow or Workflow step or Value by Participant.

Watch the [video](#) to know how to manage the Workflow Parameter default values.

**Note:** You cannot edit the Workflow Parameter name, Workflow name, and Parameter Type while editing a Workflow parameter.

## Workflow Notifications

Watch the [video](#) to know about Workflow Notification.

## Global Scripts

Global Scripts allows you to define scripts globally that can be utilized in the following PaperSave modules:

- Workflow Event PreScript
- Workflow Event PostScript
- Workflow Script activity
- Field events

**Note:** You can include the Global Script by writing **PaperSave.IncludeScript.ScriptName** in the Script Editor window.

Watch the [video](#) to know how to define and manage Global Scripts.

## Data Sync

Using this Data Sync, you can manually keep the integrated app records data updated with the Cloud/OCR server. The following topics are covered in Data Sync section:

- [OCR Data Sync](#)
- [Cloud Data Sync](#)

**Note:**

1) The following Integrated Application options will not be displayed on the Data Sync screen:

- a) Dynamic 365 Finance
- b) Paramount Workplace
- c) Paramount Workplace Enterprise
- d) Grant Edge
- e) PaperSave
- f) Virtuous CRM

2) When SQL Server Data Source is selected for an integrated application, then the Sync Query is checked against the company whether the company's column is supported with Sync Query or not. If a Company is not supported with Sync Query, then a validation message is prompted. In that case, the user needs to either exclude that company or check its configuration.

3) The companies must contain SQL Server, Data Access Server, or Web API URL Data Source. If any company is using Data Access Server URL, then that company must contain either SQL Server connecting string or the Data Access Server URL else a validation is prompted on the Data Sync screen.

4) Sync Delta column would not be displayed for the Web API Data Source on the Data Sync screen, and the Data Sync is performed based on the Unique ID column and Group by column.

5) A validation is prompted on the Data Sync screen when the Unique Id column, Sync Delta column and Group by column fields do not match the Sync Query.

6) The asterisk symbol (\*) represents mandatory fields.

## OCR Data Sync

Using this Data Sync, you can manually keep the integrated app records data updated with the OCR server.

The following topics are covered in OCR Data Sync section:

- [Adding OCR Data Sync for SQL Server Data Source](#)
- [Adding OCR Data Sync for Blackbaud SKY API Data Source](#)
- [Managing OCR Data Sync](#)

### Adding OCR Data Sync - SQL Server

Watch the [video](#) to know how to add the OCR Data Sync for SQL Server Data Source.

## **Adding OCR Data Sync - API**

Watch the [video](#) to know how to add the OCR Data Sync for API Data Source.

**Note:** The OCR Data Sync fields for the API Data source might vary based on your selected integrated application.

## Managing OCR Data Sync

Watch the [video](#) to know how to manage the OCR Data Sync.

## Cloud Data Sync

Using this Data Sync you can manually keep the integrated app records data updated with the Cloud server.

The following topics are covered in Cloud Data Sync section:

- [Adding Cloud Data Sync for SQL Server Data Source](#)
- [Adding Cloud Data Sync for Blackbaud SKY API Data Source](#)
- [Managing Cloud Data Sync](#)

## **Adding Cloud Data Sync - SQL Server**

Watch the [video](#) to know how to add the Cloud Data Sync for SQL Server Data Source.

## **Adding Cloud Data Sync - API**

Watch the [video](#) to know how to add the Cloud Data Sync for API Data Source.

**Note:** The Cloud Data Sync fields for the API Data source might vary based on your selected integrated application.

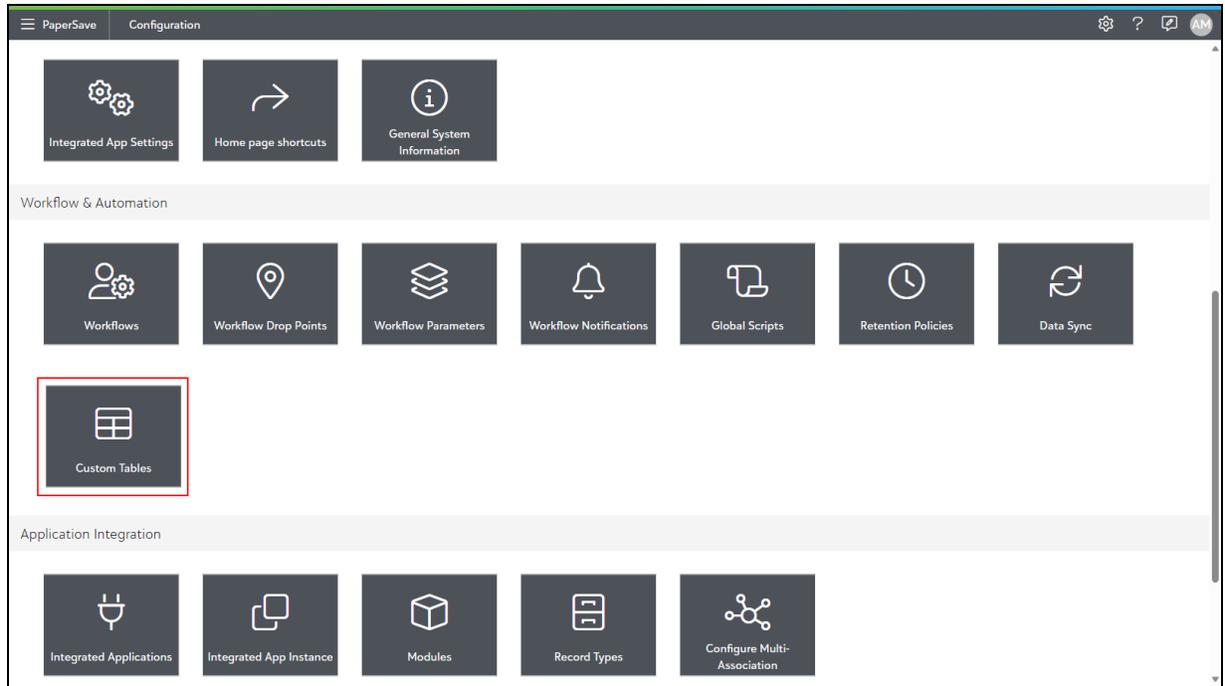
## Managing Cloud Data Sync

Watch the [video](#) to know how to manage the Cloud Data Sync.

## Custom Tables

In PaperSave, Custom Tables is a special ability that helps you to organize and manage Workflows flexibly. Custom Tables help the user to set up routing rules, field lookups or field validations in the form of different tables which can be used from the Workflows. It's like a toolbox for creating and organizing rules and checks for your documents/Workflow items.

Custom Tables can be accessed from the **Workflow & Automation** section in the **Configuration Area**.



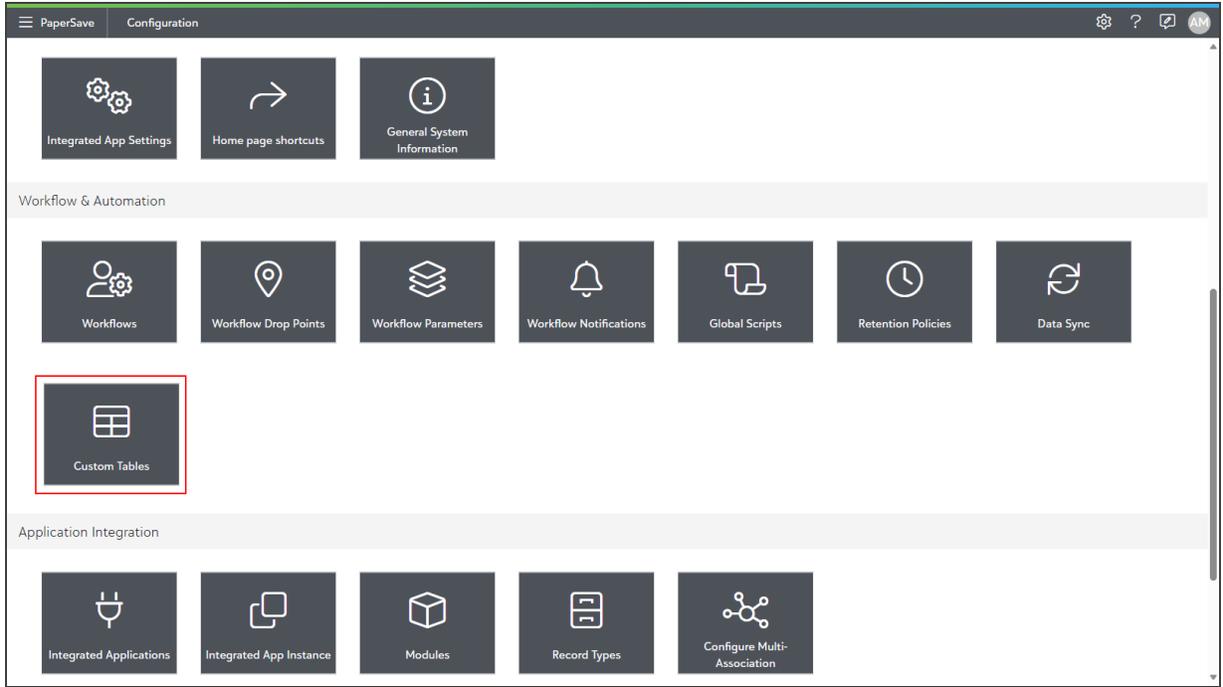
The following topics are covered in the Custom Tables section:

- [Creating the Custom Tables](#)
- [Managing the Custom Tables](#)
- [Deleting the Custom Tables](#)

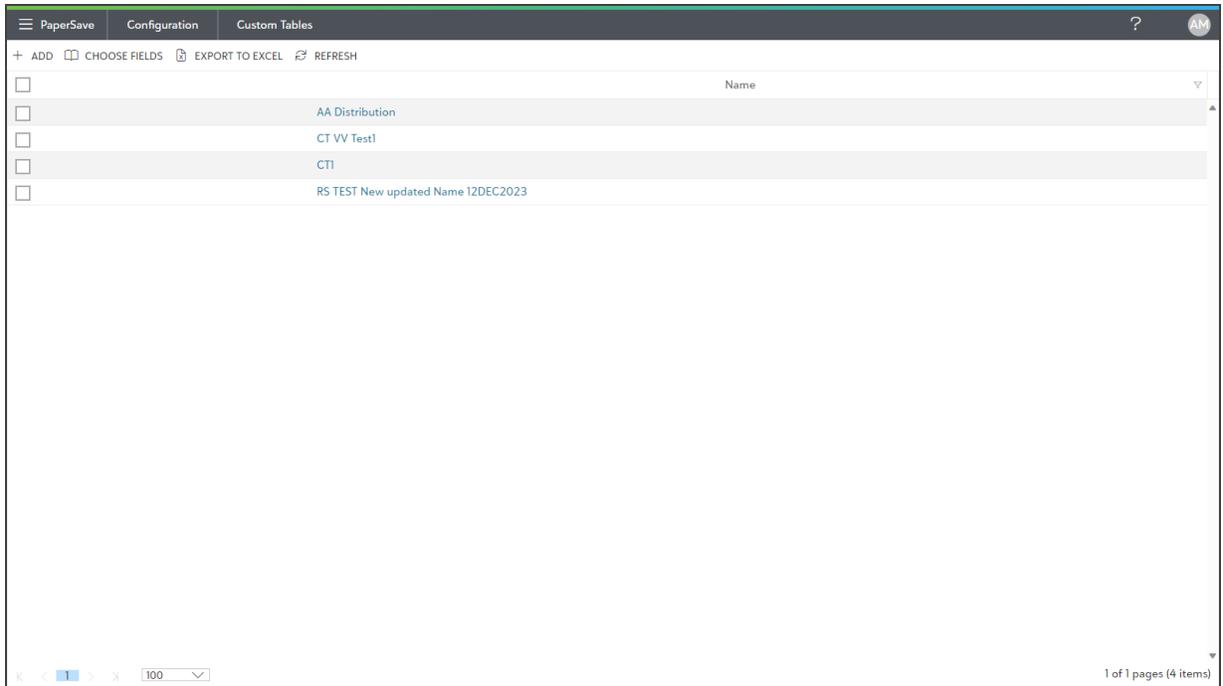
## Creating the Custom Tables

Follow the below steps to create a Custom Table:

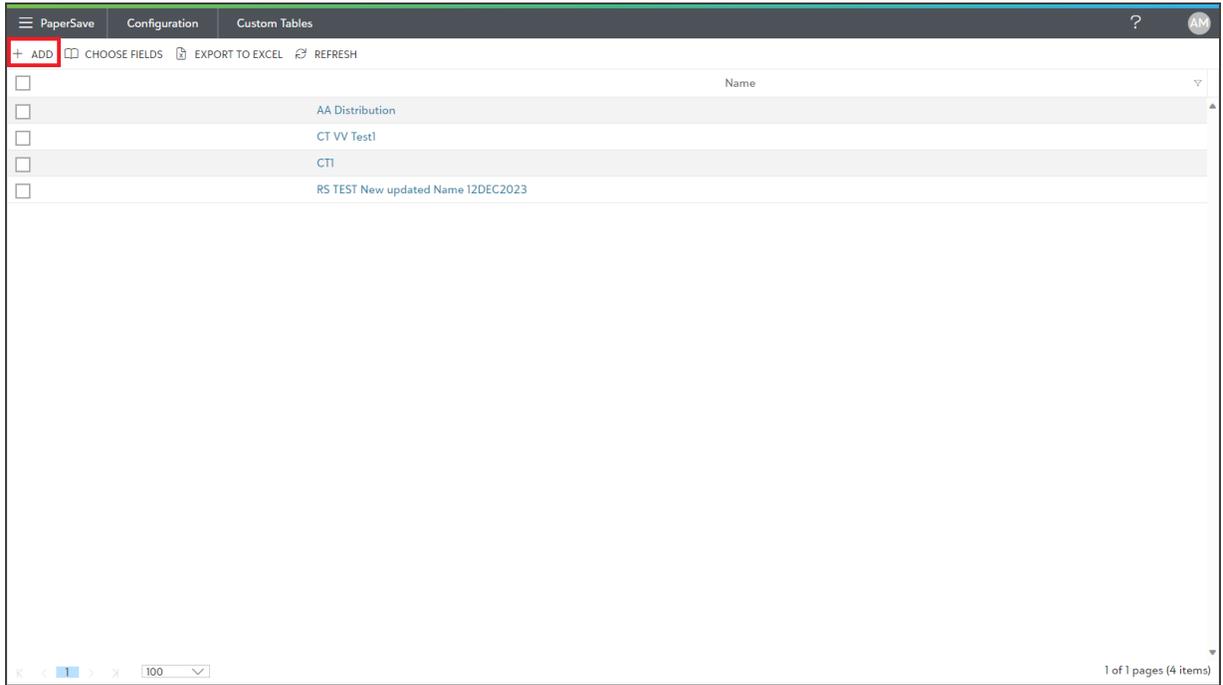
- 1) Click on the Custom Tables tile in the **Workflow and Automation** section of the **Configuration Area**.



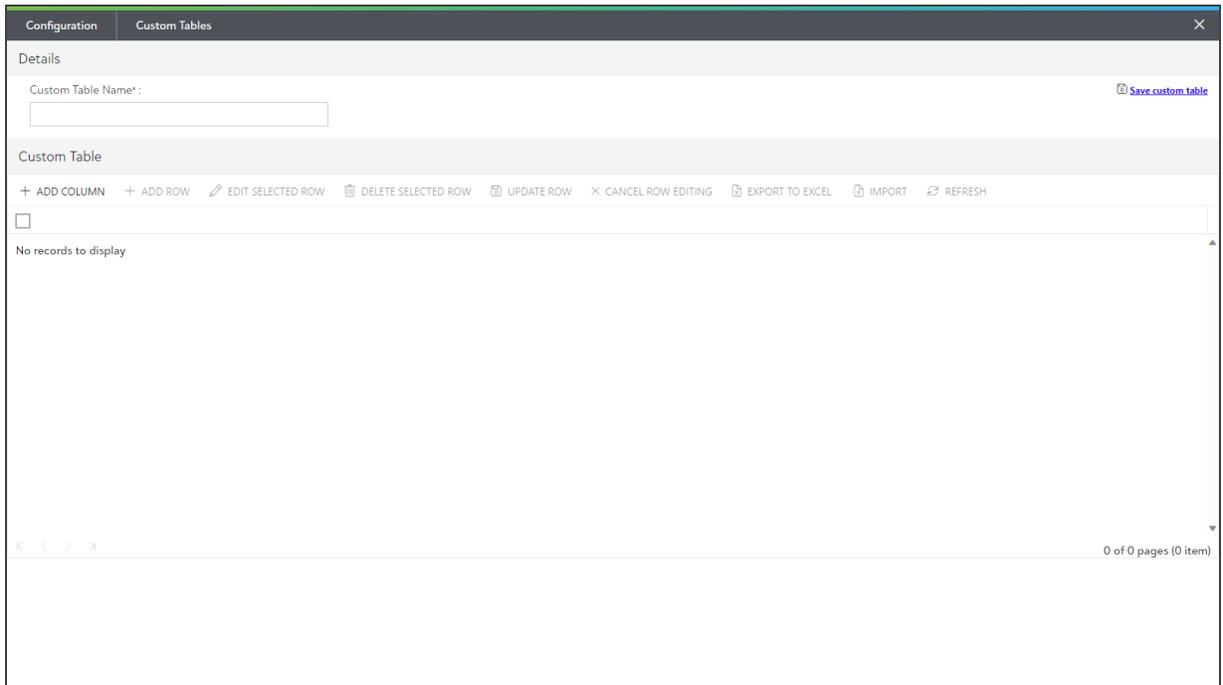
2) Now, the Custom Tables list view page opens.



3) Click on the **+ADD** option from the list toolbar, as shown in the below screen.



4) The Custom Table full-page dialogue opens as shown below.

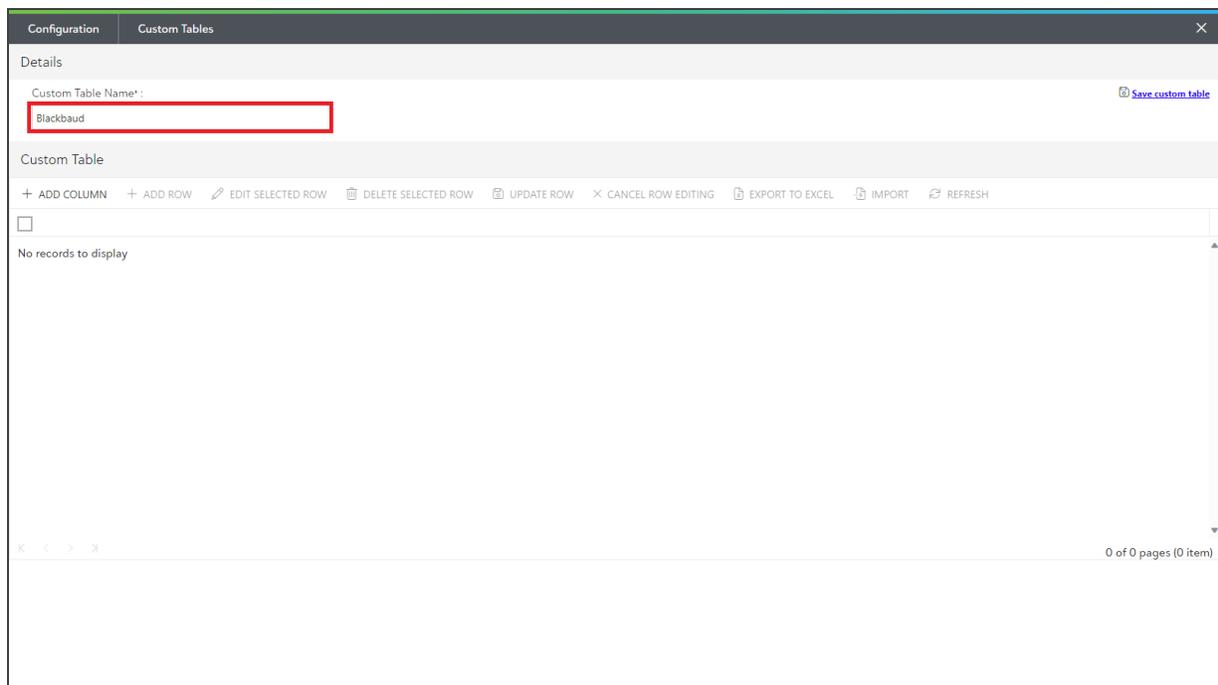


5) Enter the valid name in the **Custom Table Name** field.

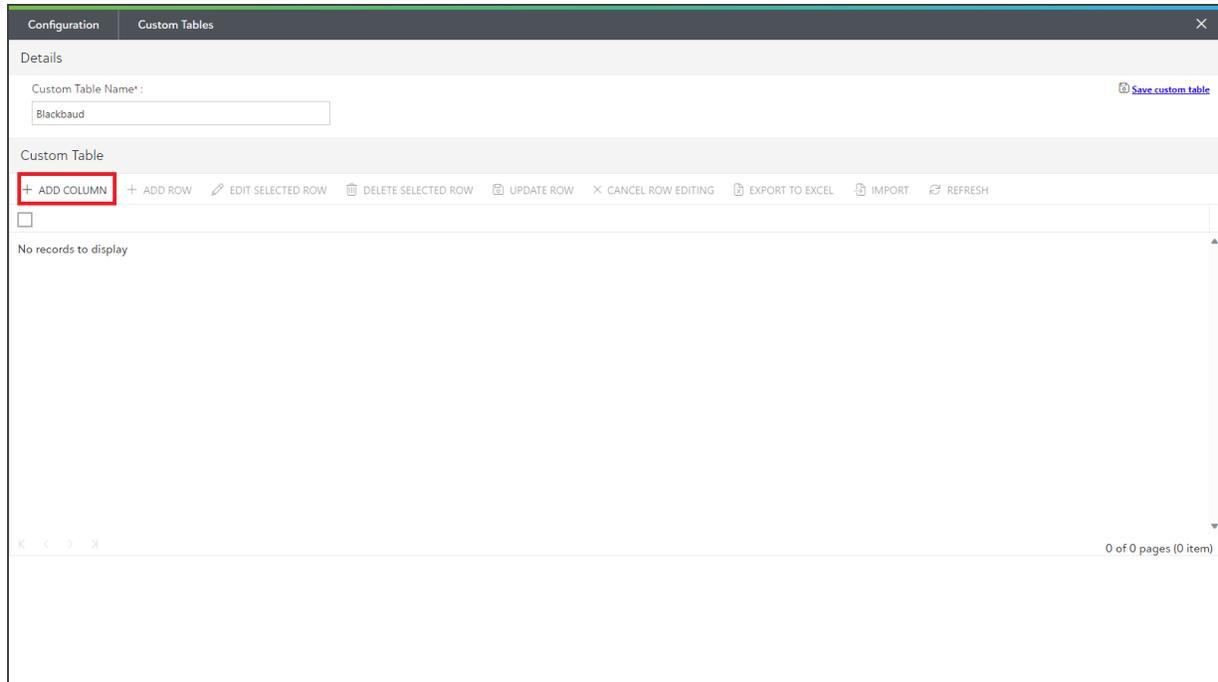
**Note:** The custom table name should be unique without any special characters and it does not allow you to repeat the same name with any of the tables in the PaperSave. If the entered custom table name had a space, then in the database the space is replaced by underscore.

Entered name: Account Information

Database stored name: Account\_Information



6) Click on the **+ ADD COLUMN** option from the list toolbar.



7) Now, enter all the required details and click on the Add button as shown below.

a) **Column Name:** Enter the valid column name.

**Note:** The column name text box allows you to enter only 30 characters, column name should be unique without any special characters, it does not allow you to repeat the same name for the columns within the Custom Tables. If the entered column name had a space, then in the database the space is replaced by underscore.

Entered name: Invoice Date  
Database stored name: Invoice\_Date

b) **Column Type:** This drop-down field has four options i.e., String, Number, Date and Users.

- **String:** Select "String" if you want to keep the type as a string field.

**Note:** The string column type text area allows you to enter only 120 characters

- **Number:** Select "Number" if you want to keep the type as a numeric field.

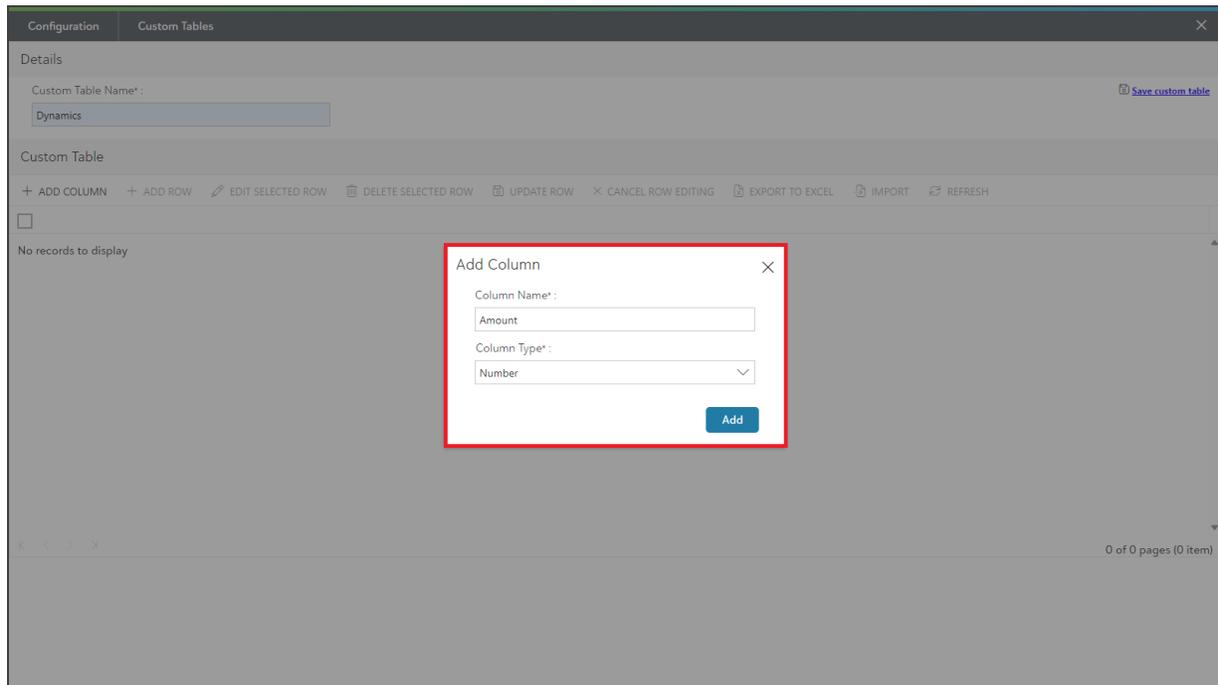
**Note:** The number column type allows only 13 values including with four decimal values.

- **Date:** Select "Date" if you want to keep the type as a date field.

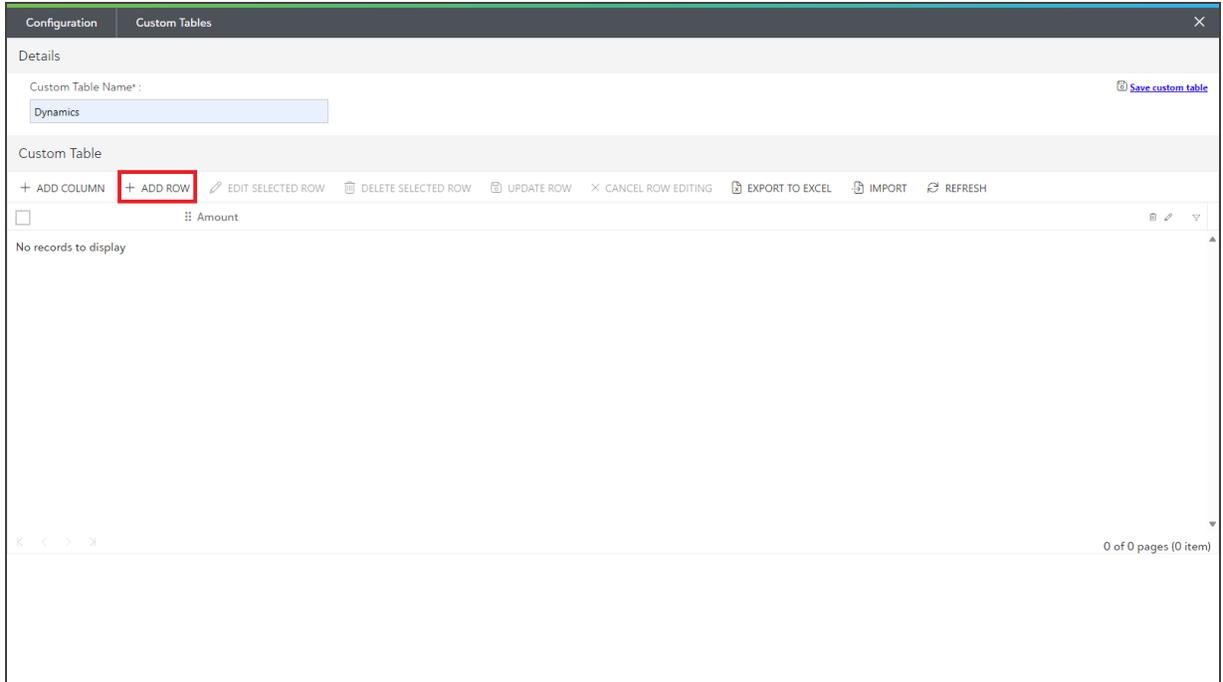
**Note:** The format of the date is displayed as per the format you have set.

- **Users:** Select "Users" if you want to keep the type as User from the drop-down list.

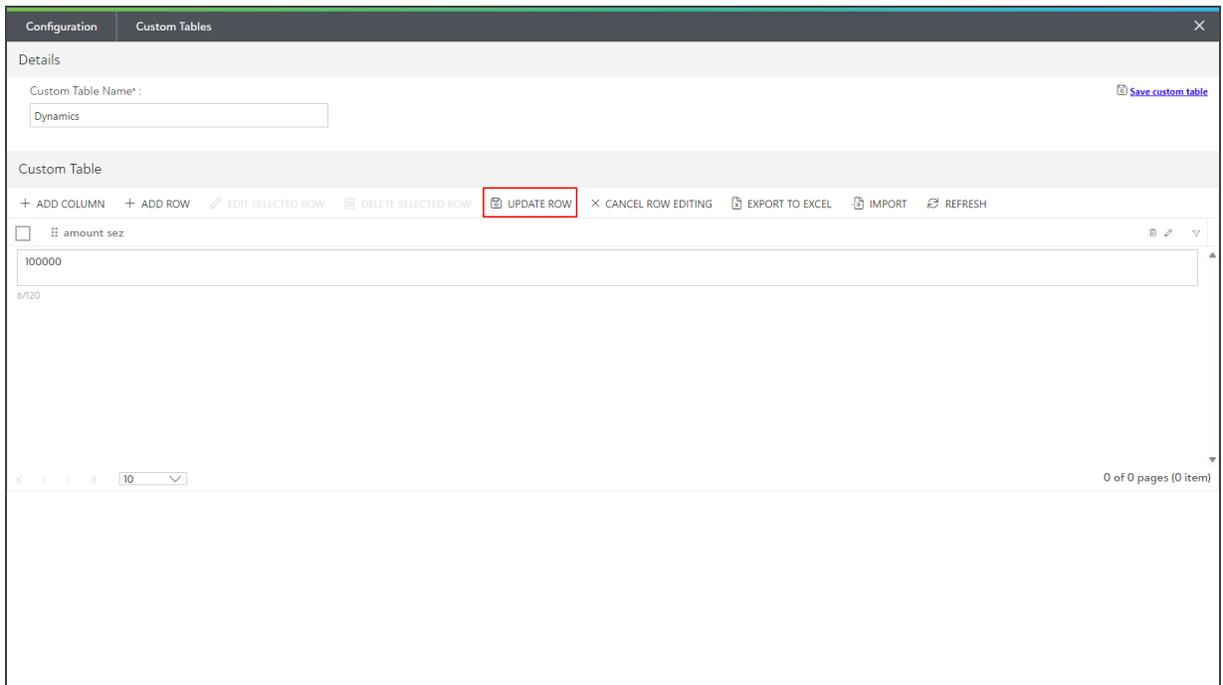
**Note:** If you keep any column blank while adding the row, then it stores the values as Null in the database for that row in that column.



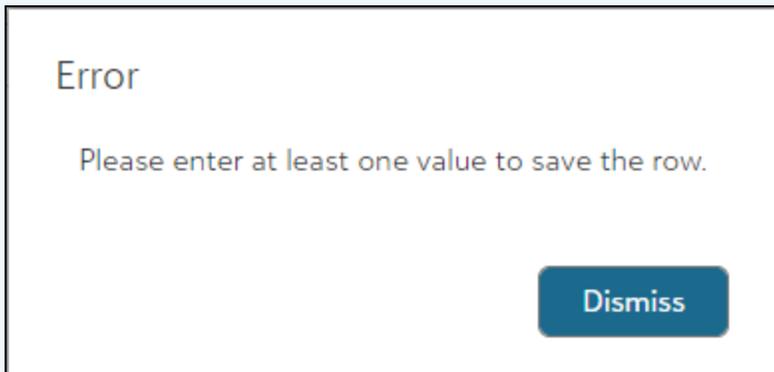
8) Click on the + **ADD ROW** option from the list toolbar, as shown in the below screen.



9) Now, fill in the details of the row and click on the **UPDATE ROW** option from the list toolbar to save the entered value in the row or click on any blank area of the grid.

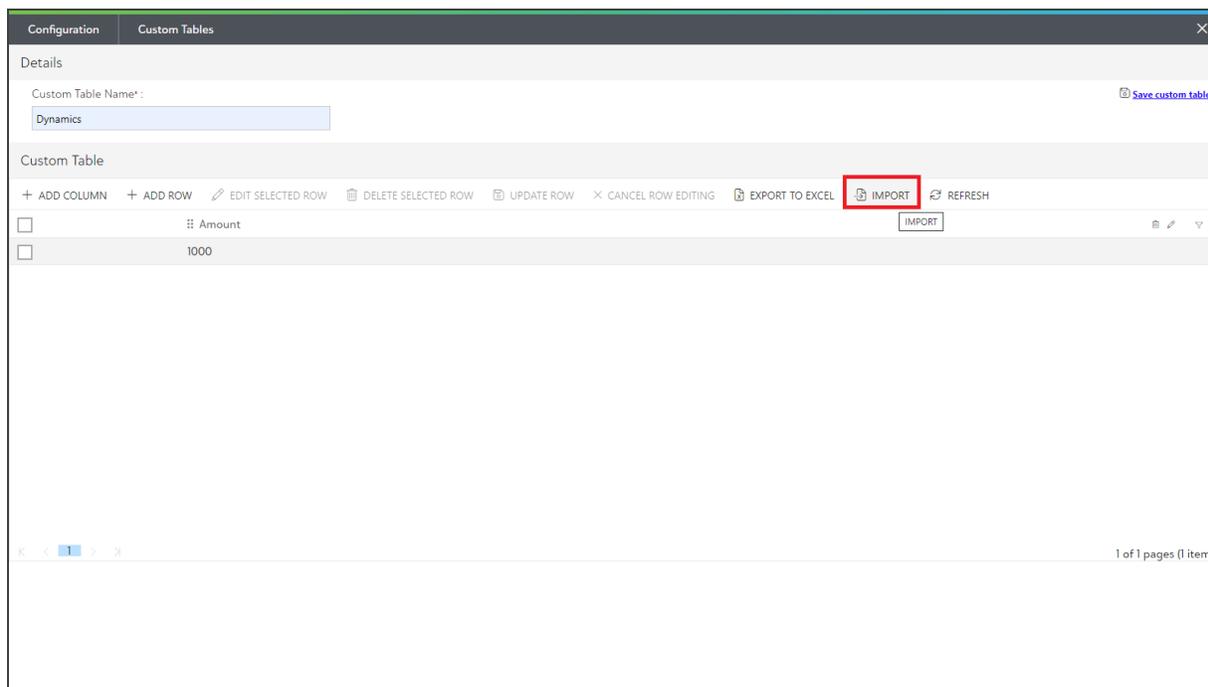


**Note:** If you try to save the blank row, a notification appears on the screen as shown below.



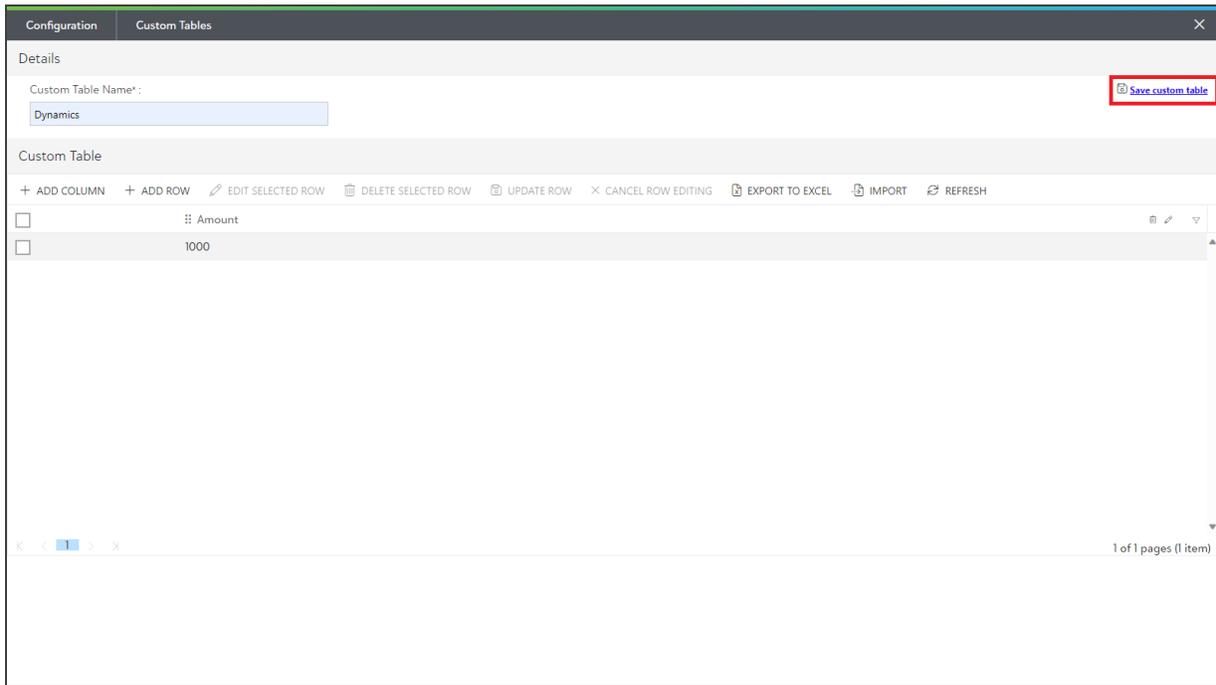
10) To add more number of rows, you can import rows by clicking the **IMPORT** option from the list toolbar.

**Note:** The import option is enabled only, when at least a single column is defined in a Custom Table.

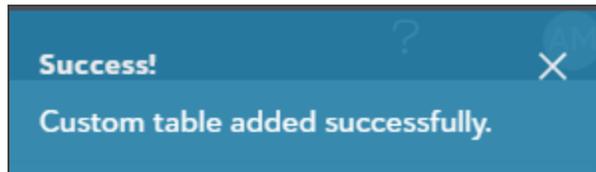


**Note:** The import option allows you to import the data from the .CSV file. Refer to this [page](#) to learn more.

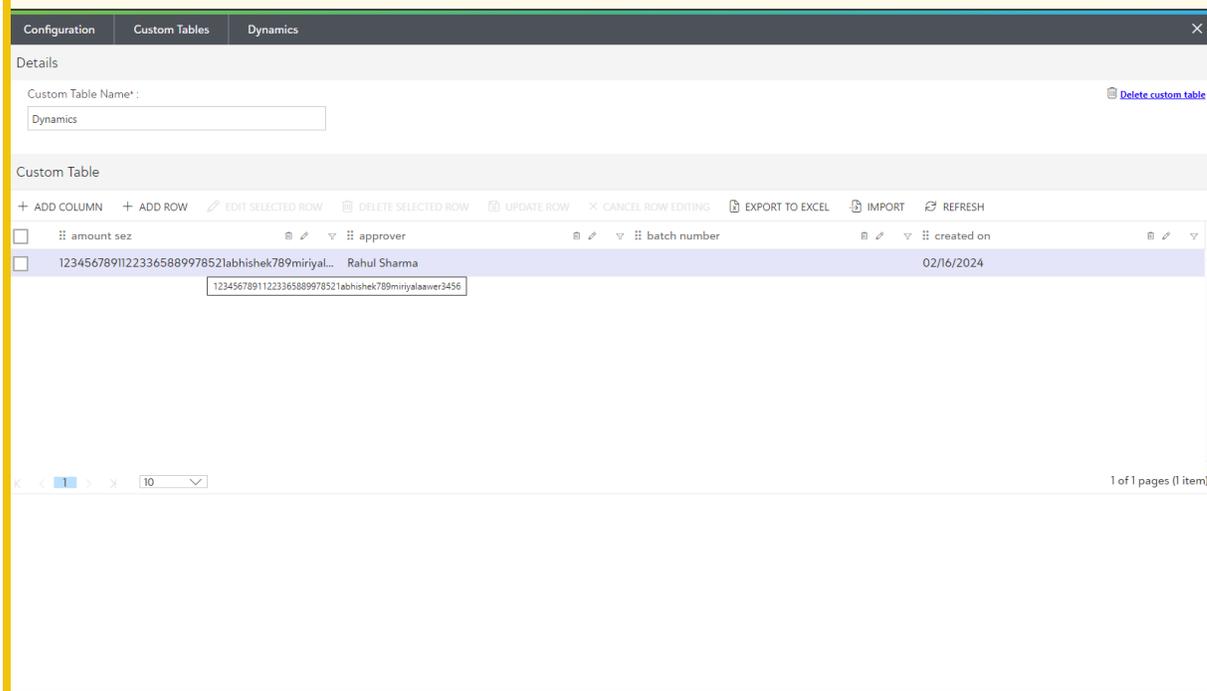
11) Now, click on the **Save Custom Table** as shown below.



12) A success/failure message will appear in the top-right corner of the screen.



**Tip:** A tool tip is displayed with the whole value entered in the string type column, when you hover the mouse on it as shown below.



## Managing the Custom Tables

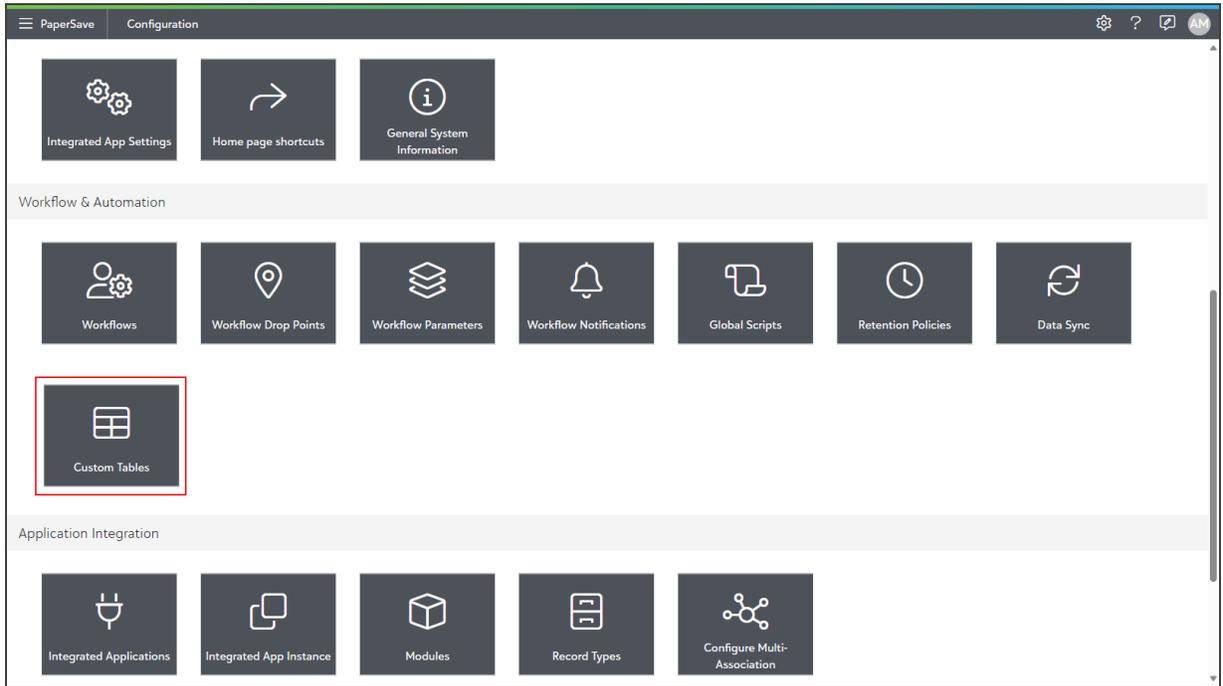
The following topics are covered in Managing the Custom Tables:

- [Editing the columns and rows within the Custom Tables.](#)
- [Deleting the columns and rows within the Custom Tables.](#)

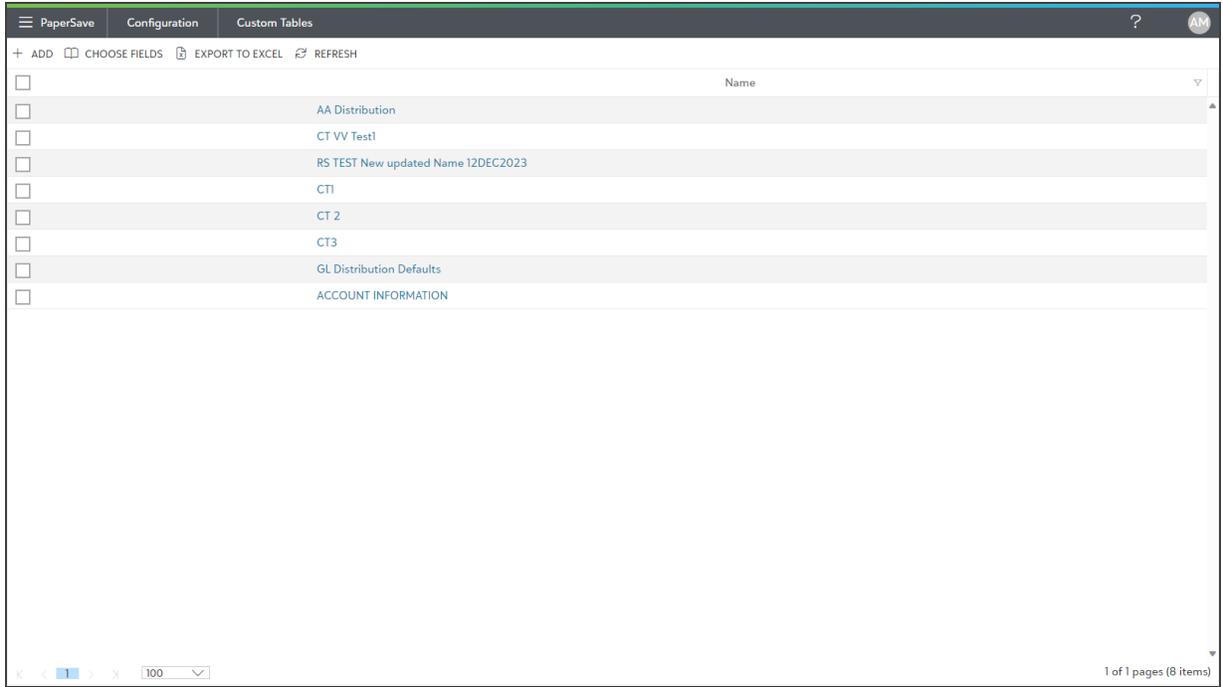
## Editing the columns and rows within the Custom Tables

Follow the below steps to edit the column and rows within the Custom Table:

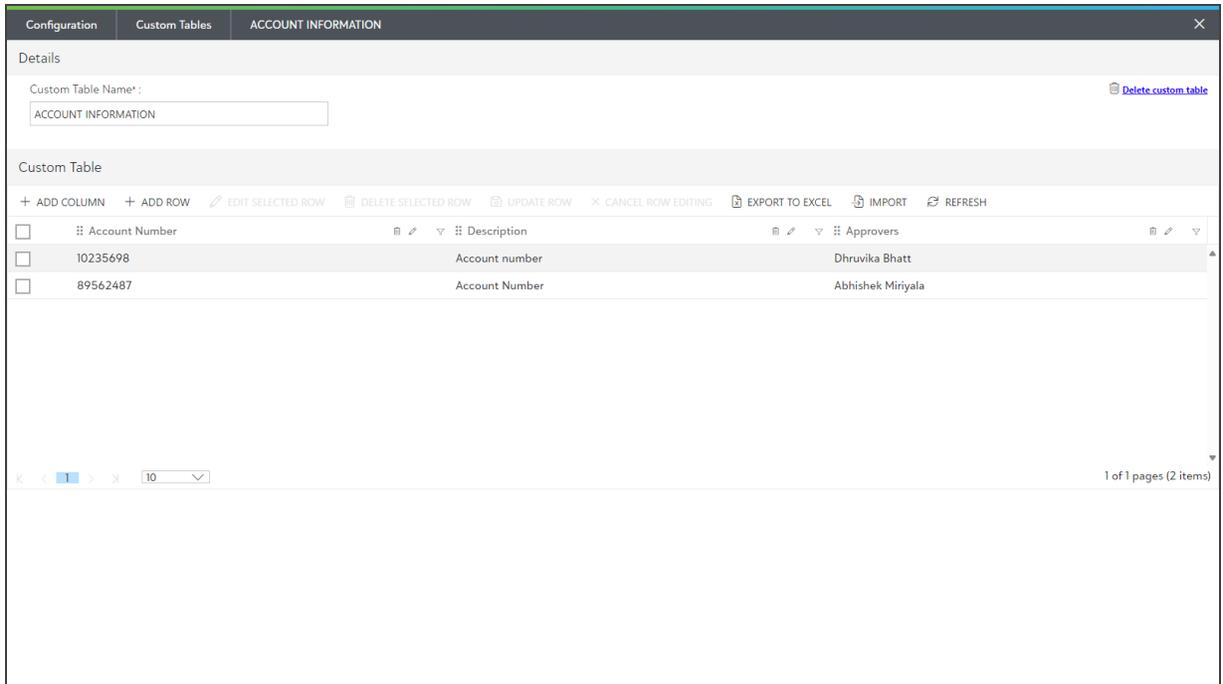
1) To edit the columns and rows within the Custom Table, click on the **Custom Tables** tile in the **Workflow and Automation** section of the **Configuration Area**.



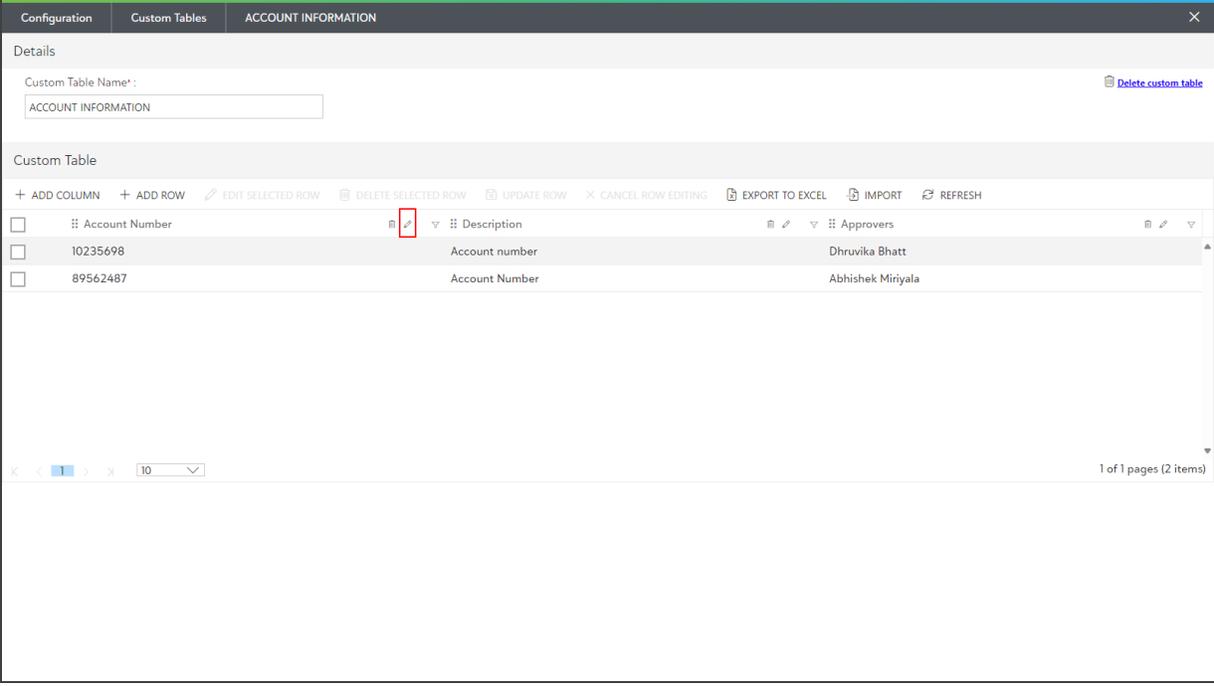
2) Now, the Custom Tables list view page opens. Now, click on the desired custom table from the list below.



3) The Custom Tables full-page dialog appears as shown below.



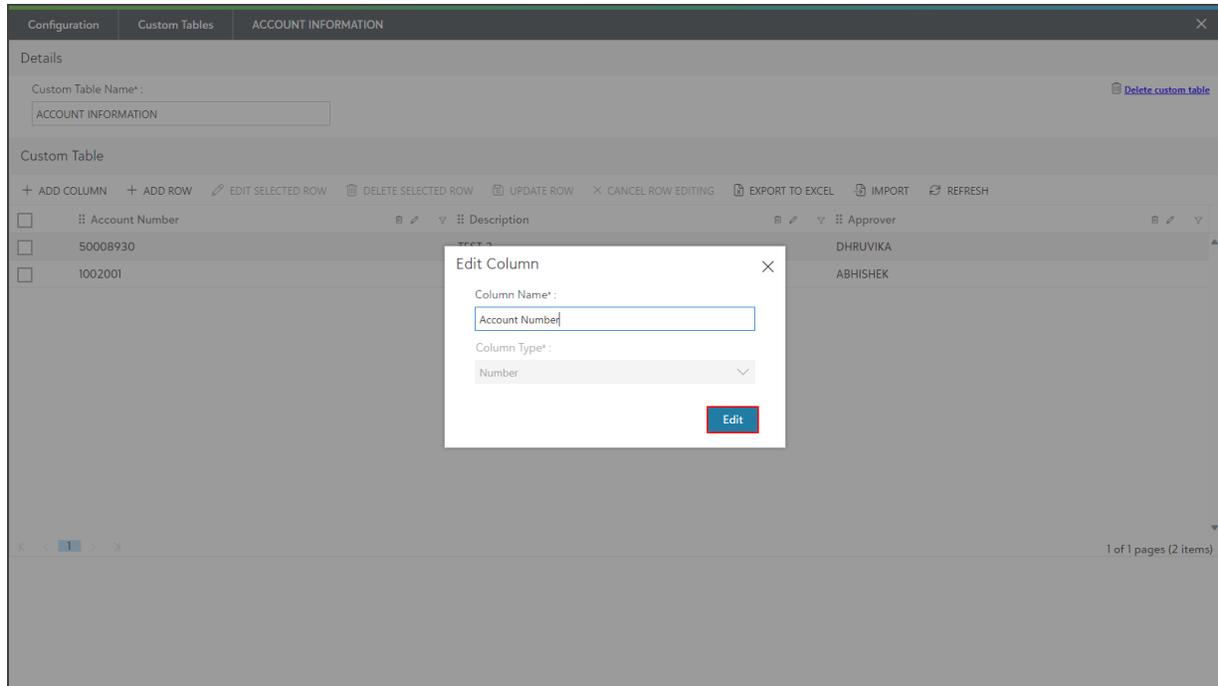
4) You can also change the Custom table name if you want. To edit the columns, click on the  Edit icon as shown below.



The screenshot displays a configuration window for a custom table named 'ACCOUNT INFORMATION'. The interface includes a 'Details' section with a text input field for the table name and a 'Delete custom table' button. Below this is a 'Custom Table' section with a toolbar containing options like 'ADD COLUMN', 'ADD ROW', 'EDIT SELECTED ROW', 'DELETE SELECTED ROW', 'UPDATE ROW', 'CANCEL ROW EDITING', 'EXPORT TO EXCEL', 'IMPORT', and 'REFRESH'. A table with three columns is shown: 'Account Number', 'Description', and 'Approvers'. The 'Description' column is currently in edit mode, and the 'Account Number' column has a red box around its edit icon. The table contains two rows of data.

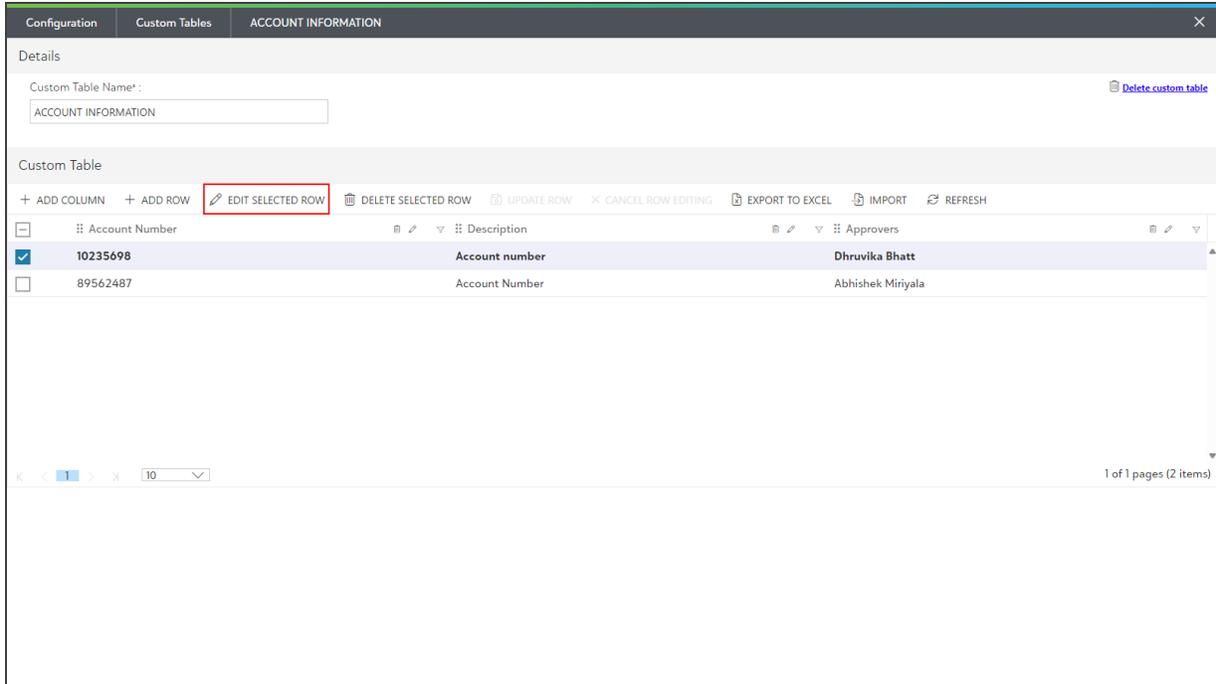
Account Number	Description	Approvers
10235698	Account number	Dhruvika Bhatt
89562487	Account Number	Abhishek Miriyala

5) Now the column opens in an edit mode, you can make necessary changes as needed and click on the **EDIT** button to save the changes.

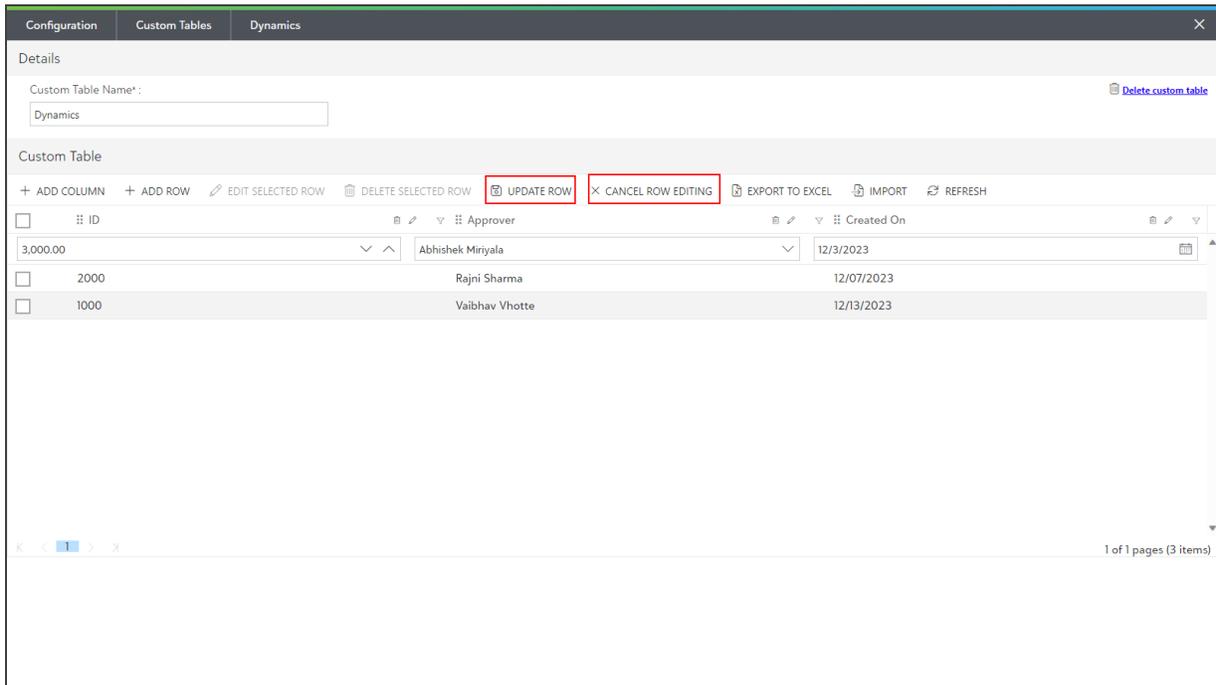


**Note:** The **Column Type** drop-down option can be edited only when there are no row values under the selected Column Type.

6) Select the row and click on the **EDIT SELECTED ROW** option from the list toolbar or double-click on the row to open it in edit mode.



7) After making the necessary changes you can click on the **UPDATE ROW** option or click on any blank area of the grid to save, or you can click on the **CANCEL ROW EDITING** option from the list toolbar to undo the changes.



**Note:** To rearrange the order of the columns within the Custom table, you can simply drag them to the desired position in the table as shown below.

Configuration Custom Tables ACCOUNT INFORMATION

Details

Custom Table Name: ACCOUNT INFORMATION [Delete custom table](#)

Custom Table

+ ADD COLUMN + ADD ROW EDIT SELECTED ROW DELETE SELECTED ROW UPDATE ROW CANCEL ROW EDITING EXPORT TO EXCEL IMPORT REFRESH

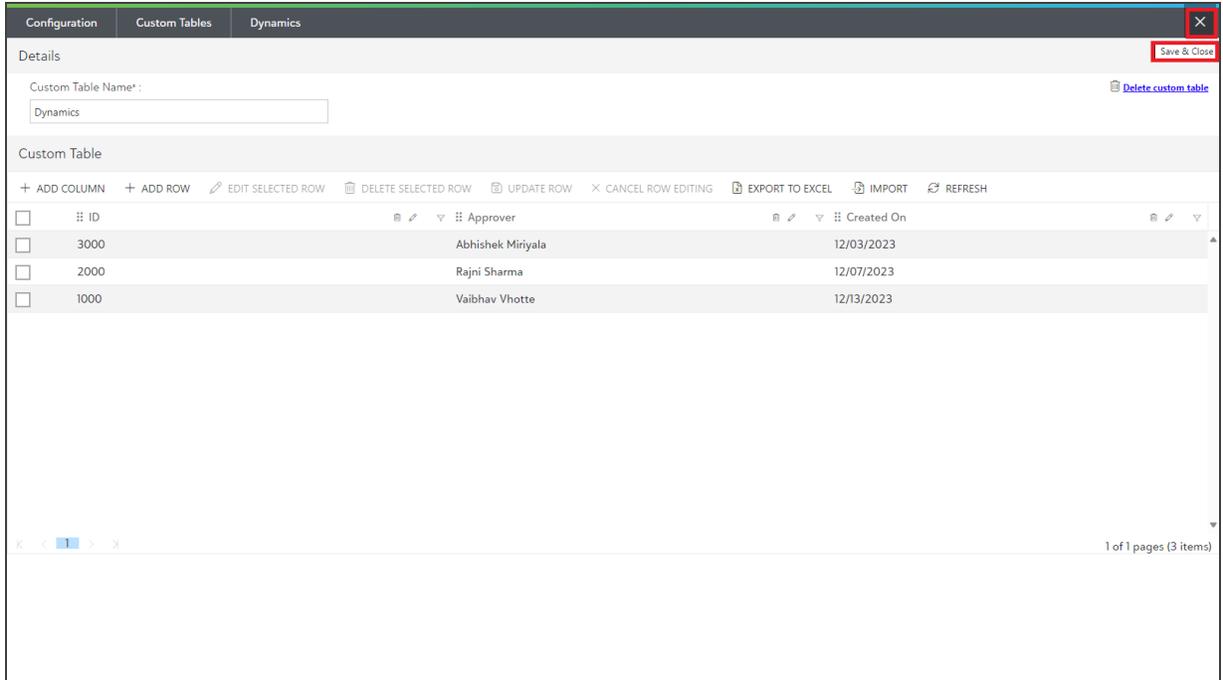
<input type="checkbox"/>	Account Number	Description	Approvers	<input type="checkbox"/>
<input type="checkbox"/>	10235698	Account number	Dhruvika Bhatt	
<input type="checkbox"/>	89562487	Account Number	Abhishek Miriyala	

1 of 1 pages (2 items)

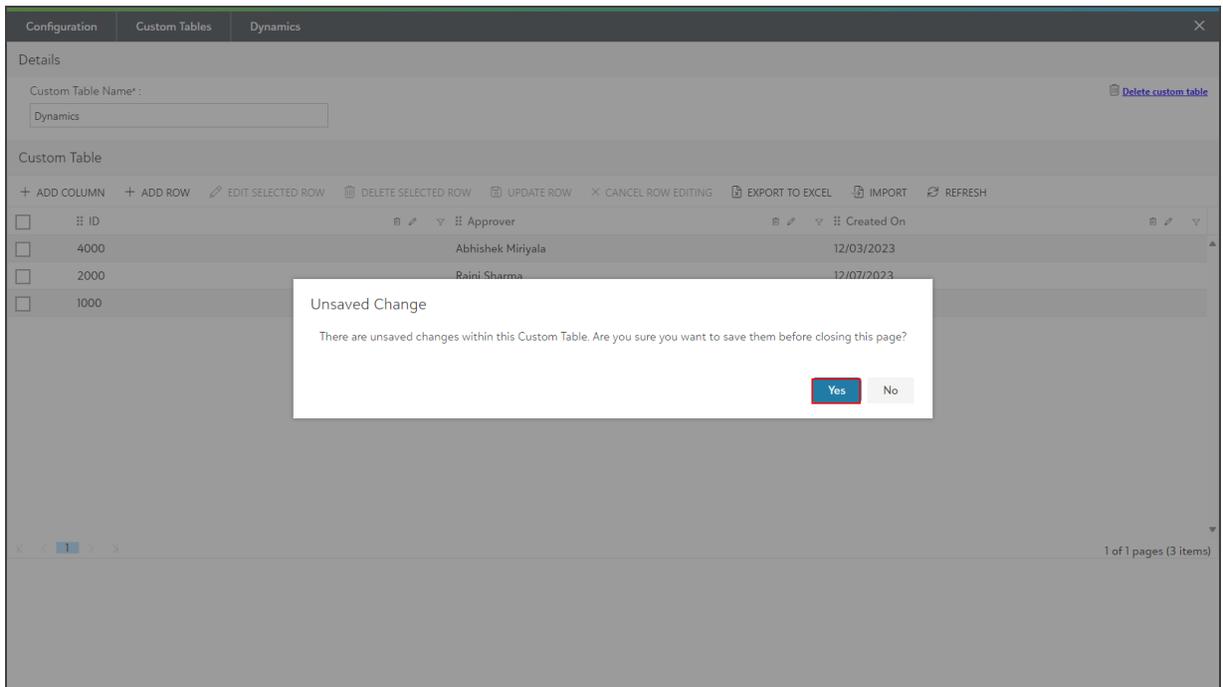
8) To add more number of rows within the Custom table, click [here](#) to learn how to import the Rows using the **Import** button from the list toolbar.

**Note:** All the changes that you do in the table remain only in the grid, once you click on close and confirm to save the changes, then only it reflects all the changes in the database.

9) Click on the **X** button to **Save and Close** the Custom table.

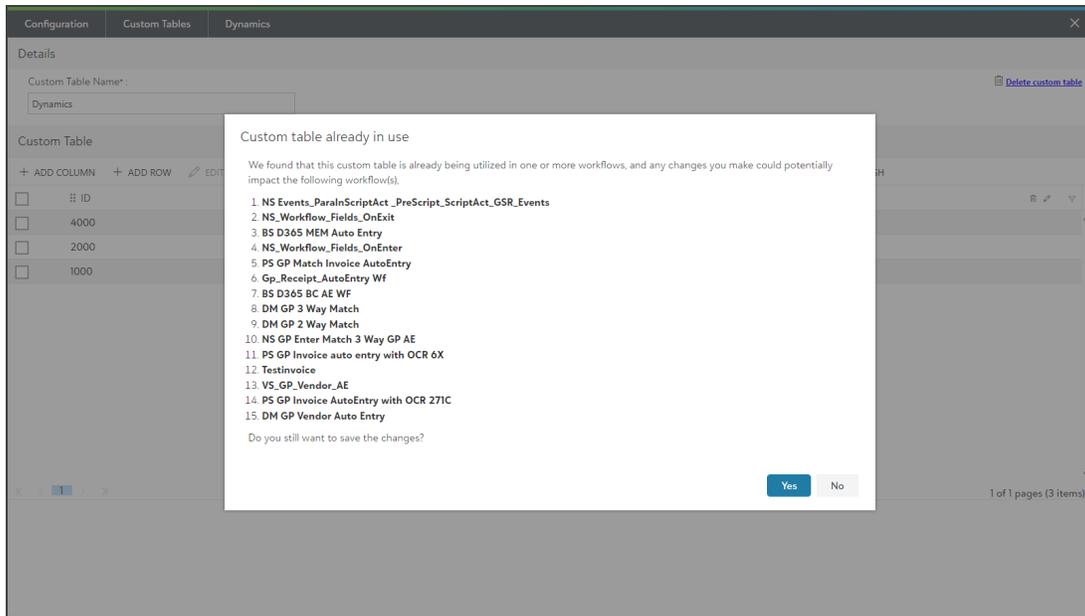


10) A notification "Unsaved Change "pops up on the screen, click Yes option to save the changes as shown below.

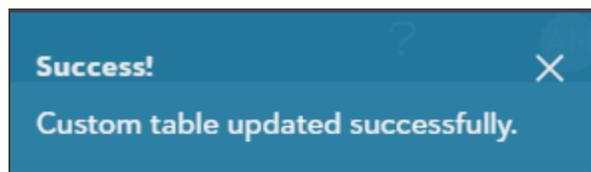


11) Now, it validates whether the custom table is used within any workflow or not. Refer to steps 11(a) and 11 (b).

11(a) If the Custom table is used in any of the Workflows, then it shows the “Custom table Already in use” dialog as shown below

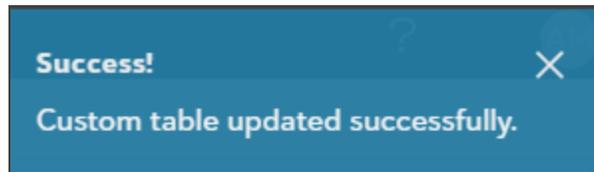


- If you click on the **Yes** option, a successful notification appears on the top-right corner of the screen and redirects to the Custom Tables list view page.



- If you click on the No option, the update operation gets cancelled and redirects to the Custom Tables list view page.

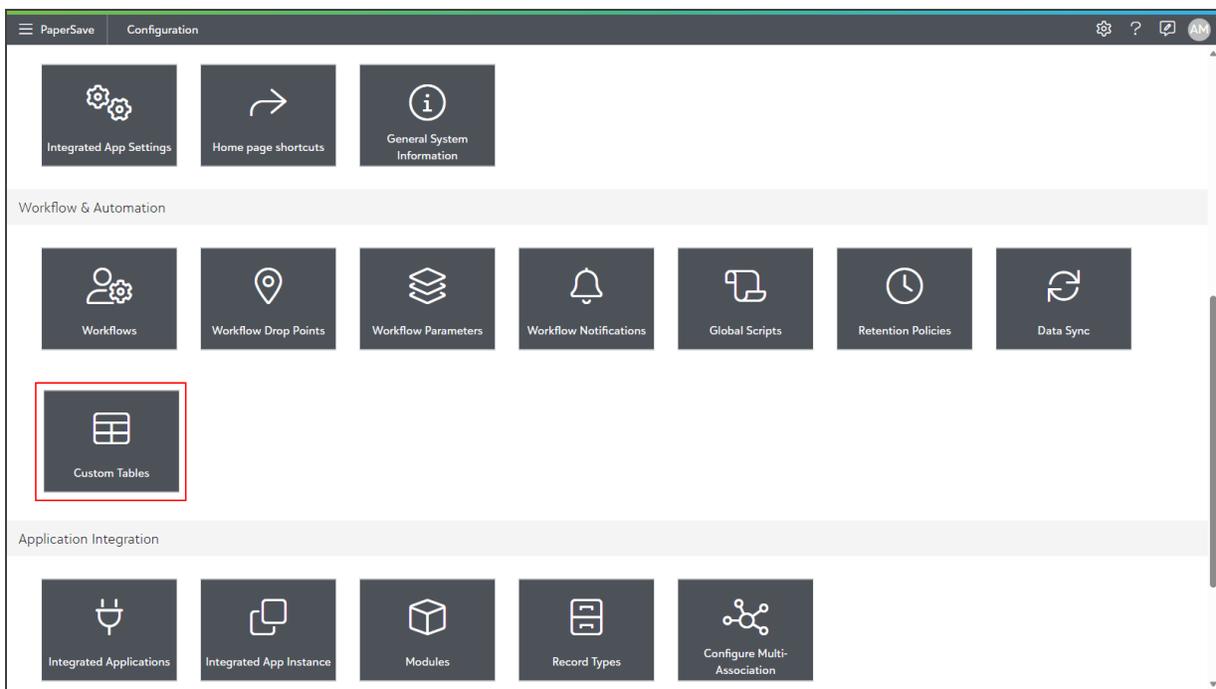
11(b) If the Custom table is not used in any of the Workflows, a successful notification appears on the top-right corner of the screen and redirects to the Custom Tables list view page.



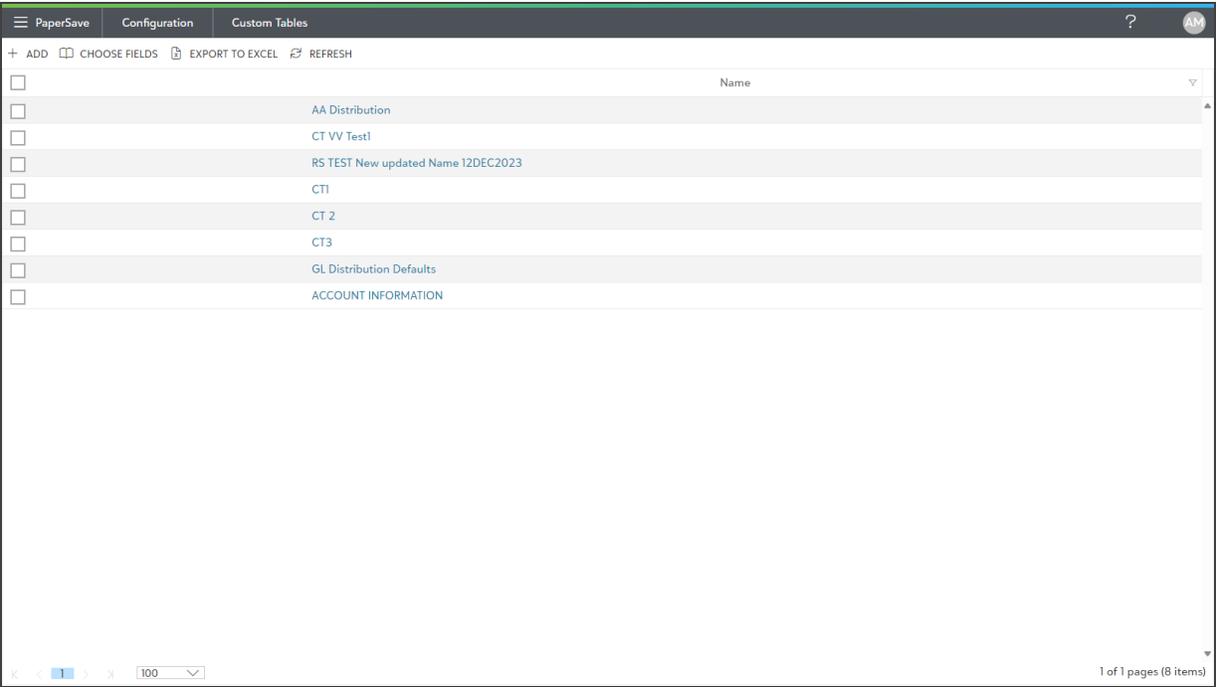
## Deleting the columns and rows within the Custom Tables

Follow the below steps to delete the column and rows within the Custom Table:

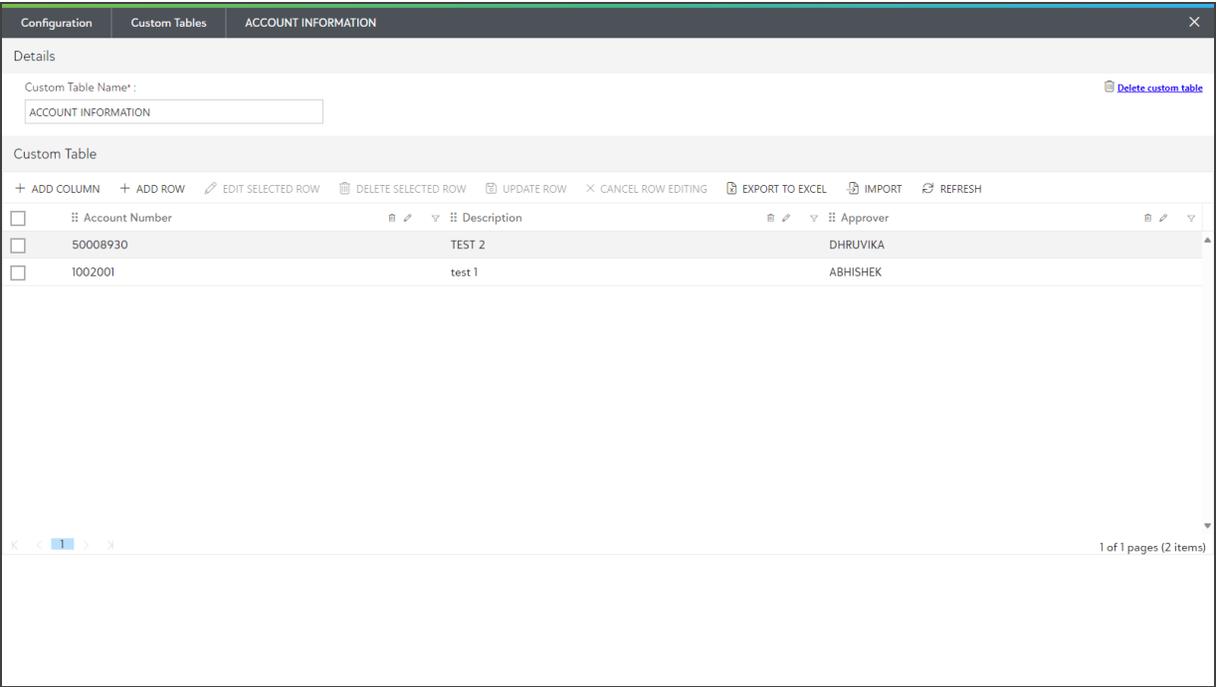
1) To delete the columns and rows within the Custom Table, click on the **Custom Tables** tile in the **Workflow and Automation** section of the **Configuration Area**.



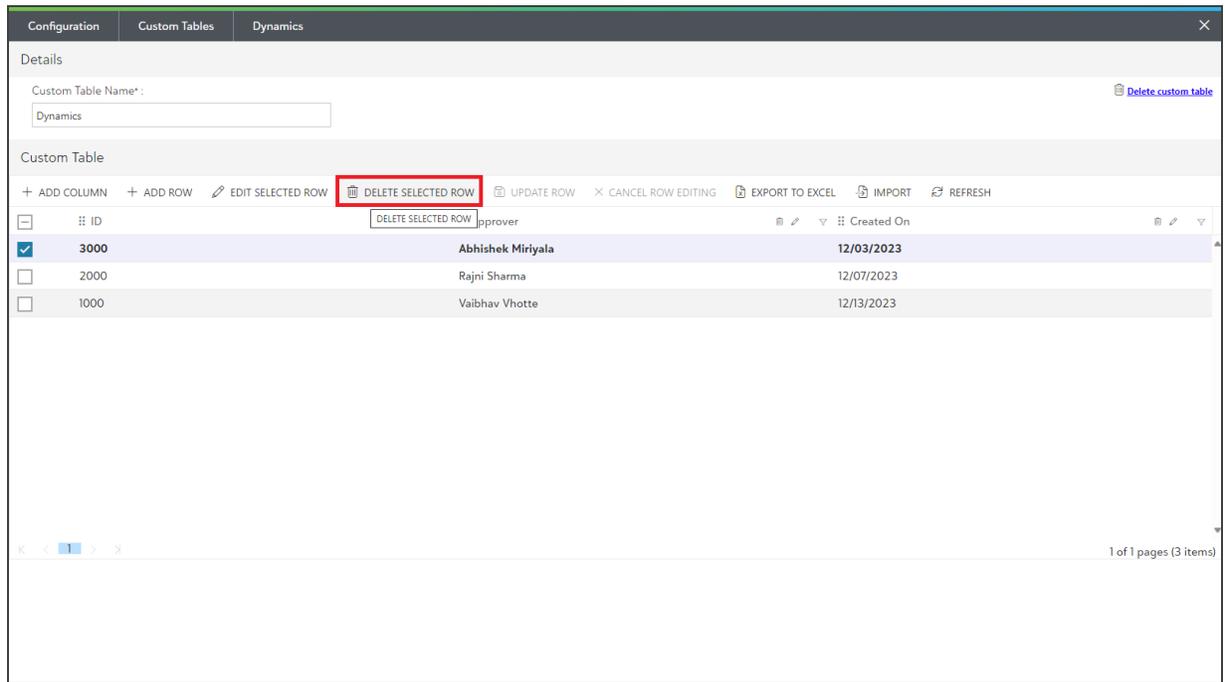
2) Now, the Custom Tables list view page opens. Now, click on the desired custom table from the list below.



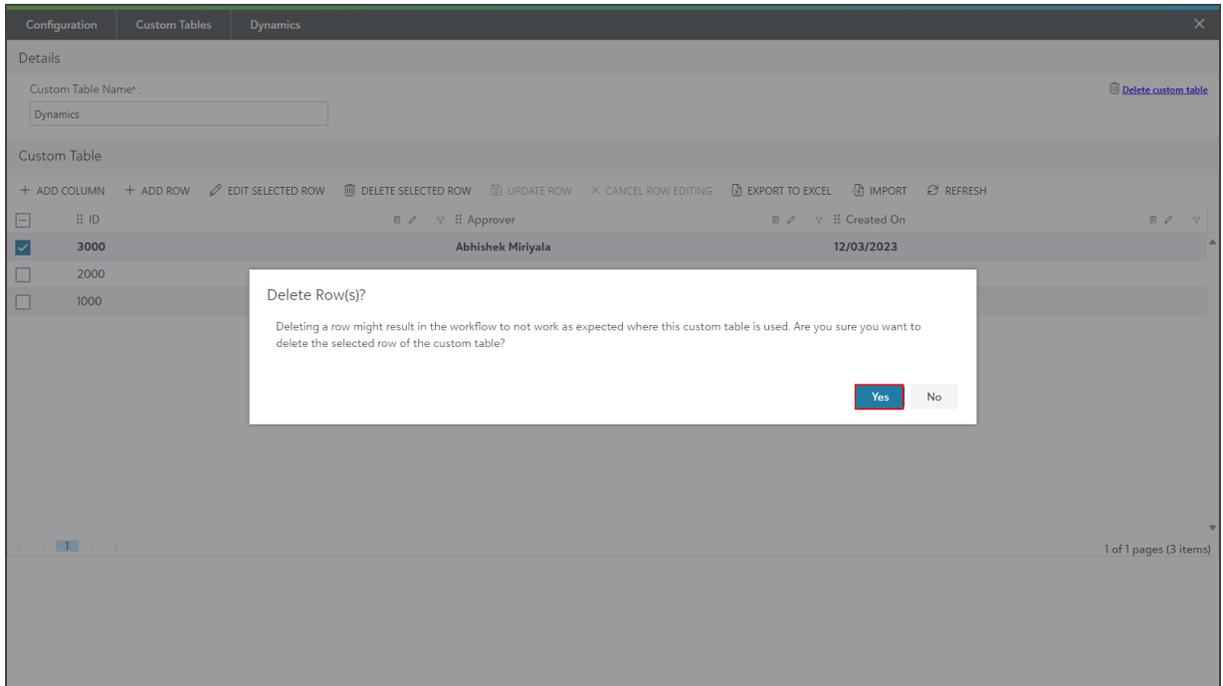
3) The Custom Tables full-page dialog appears as shown below.



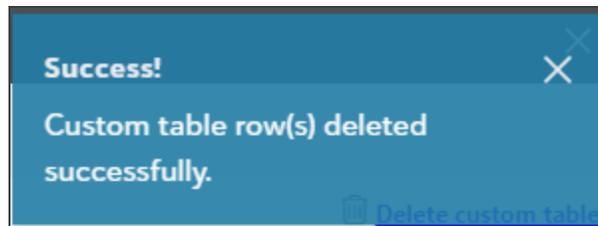
4) To delete the row, select the row and click on the **DELETE SELECTED ROW** option from the list toolbar as shown below.



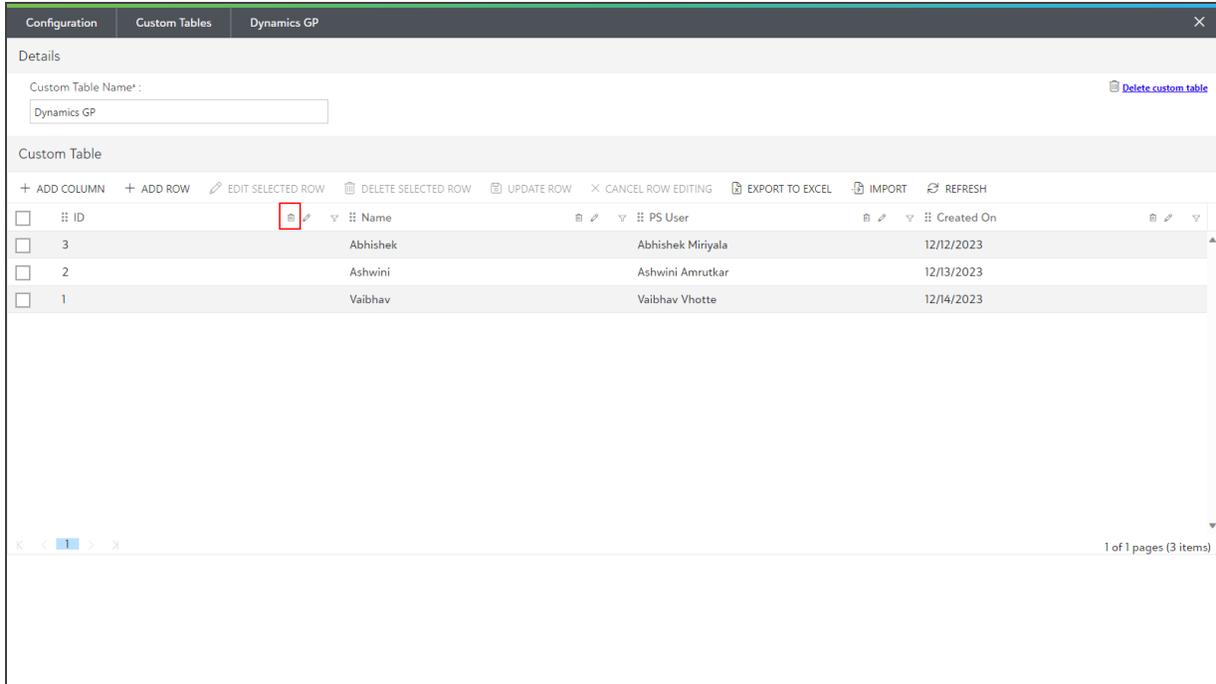
5) Now, a confirmation notification "Delete Row(s)?" pops up on the screen as shown below, click on **Yes** to delete the selected row.



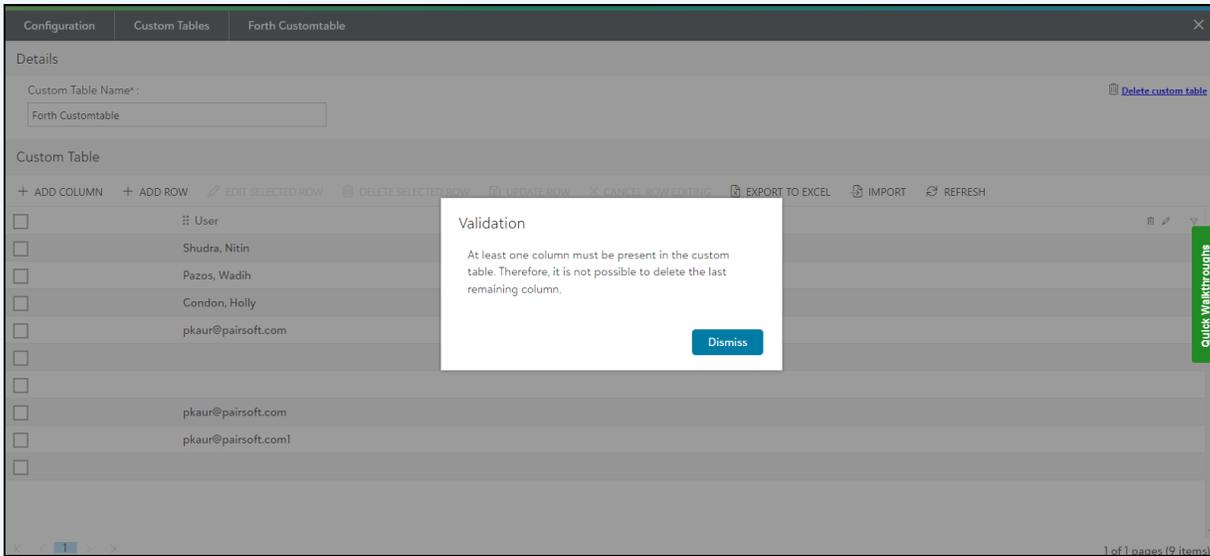
6) A successful notification appears on the top-right corner of the screen.



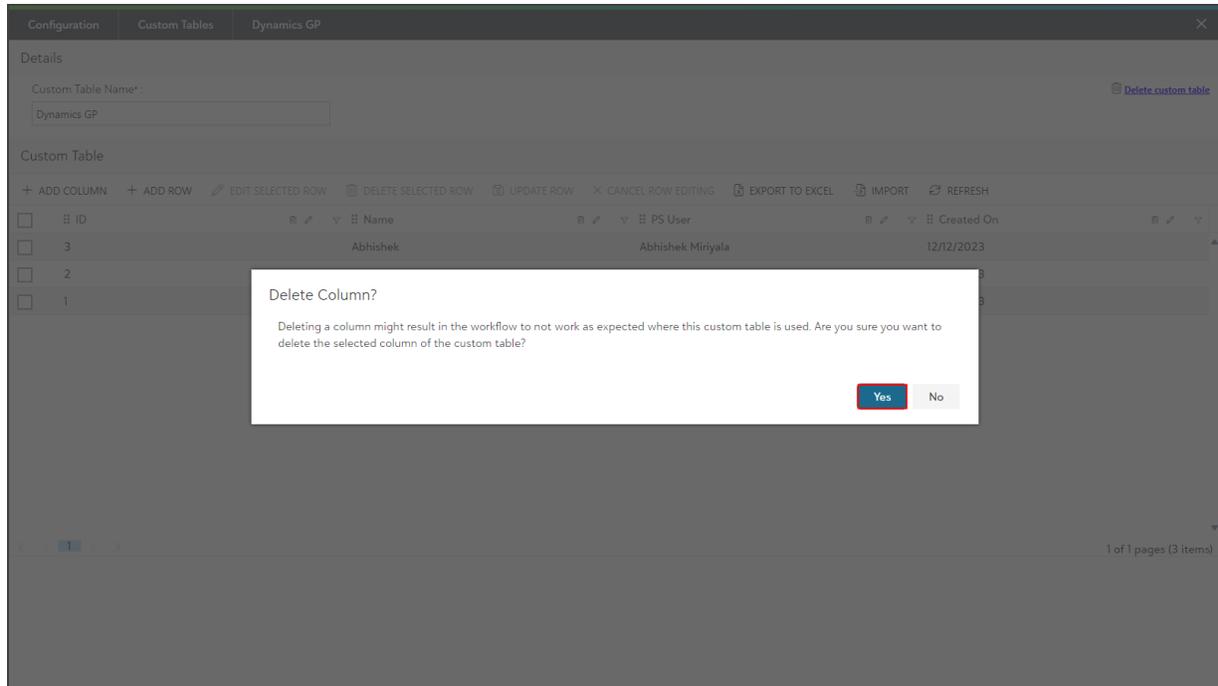
7) To delete the column, click on the  delete icon as shown below.



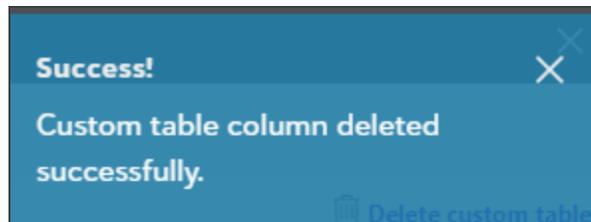
**Note:** A validation message "At least one column should be present in the custom table" pops up on the screen as shown below, when you try to delete last remaining column within the custom table.



8) Now, a confirmation notification "Delete column?" pops up on the screen, click on the **Yes** option as shown below.

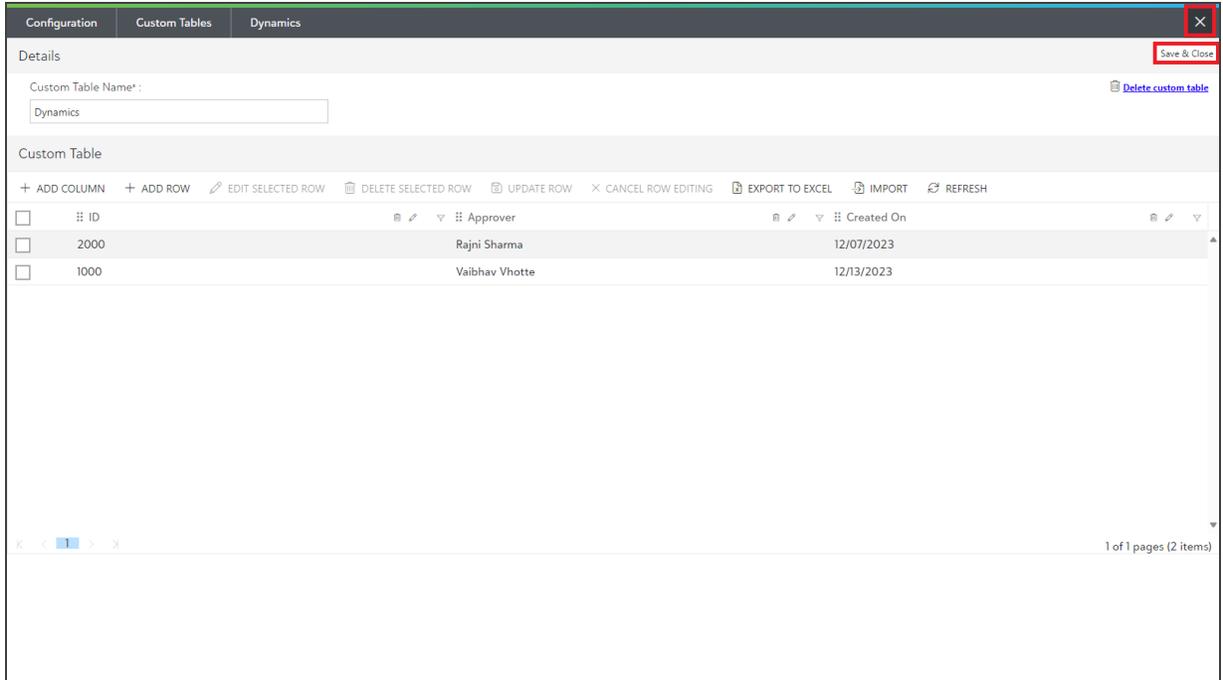


9) A successful notification appears on the top-right corner of the screen.

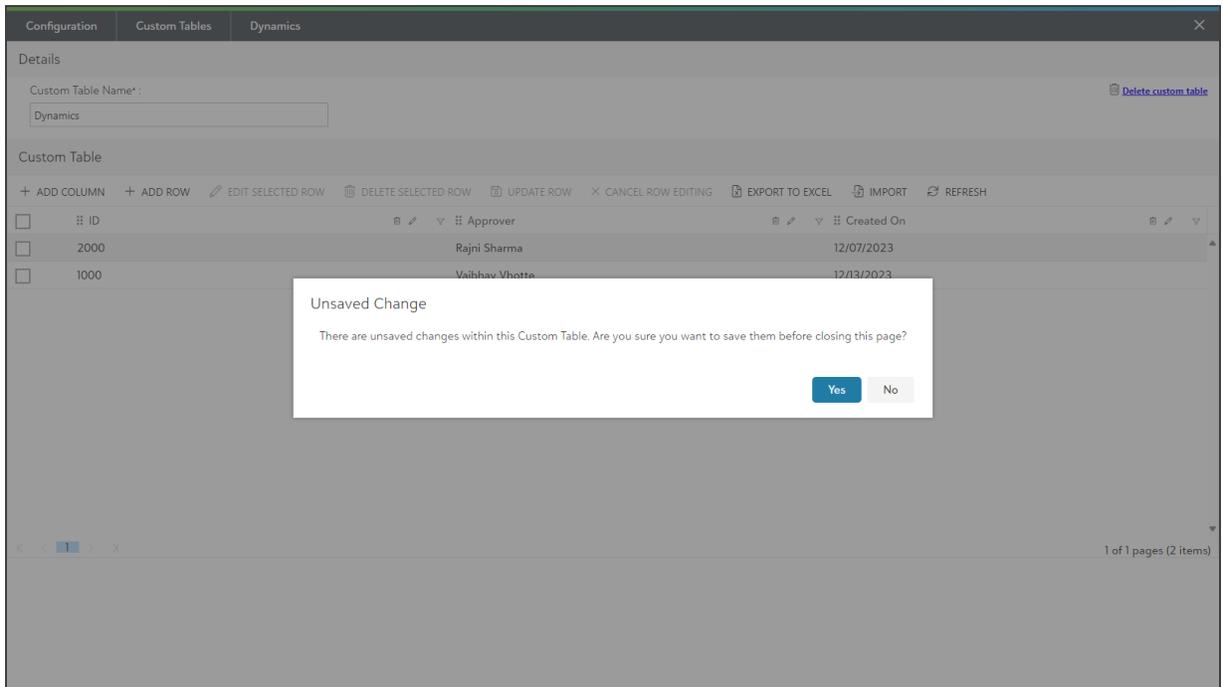


**Note:** All the changes that you do in the table remain only in the grid, once you click on close and confirm to save the changes, then only it reflects all the changes in the database.

10) Now, click on the **X** button to **Save and close** the custom table.

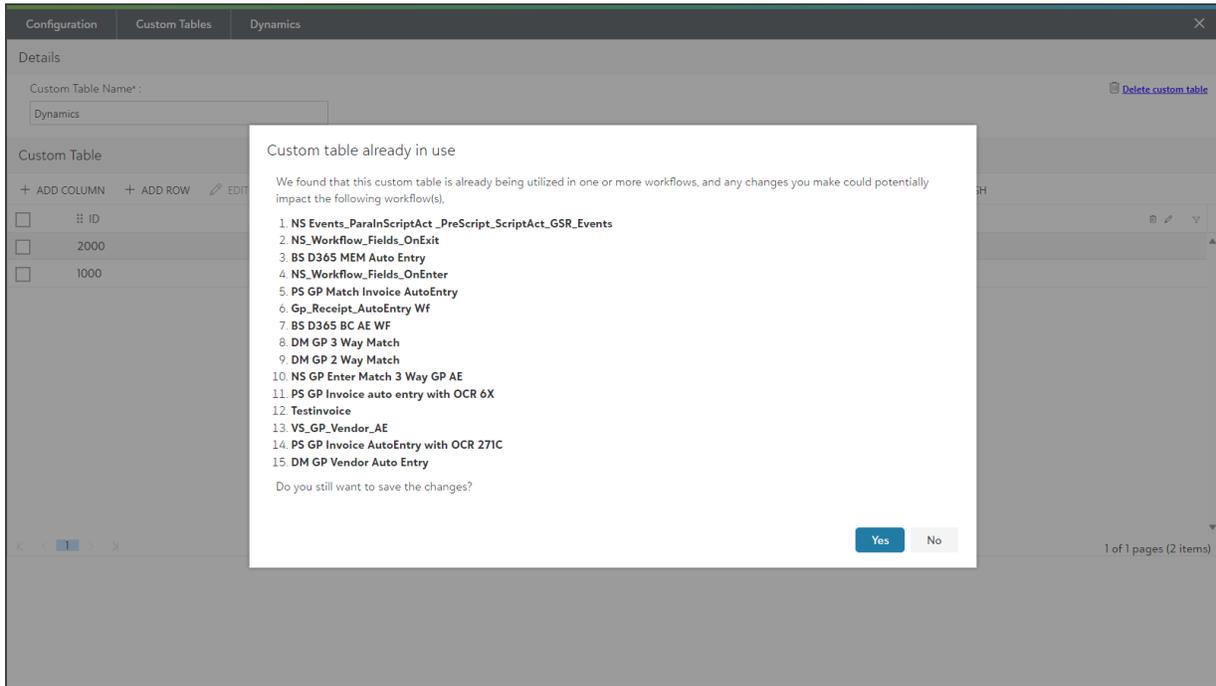


11) A notification "Unsaved Change" pops up on the screen, click **Yes** option to save the changes as shown below.

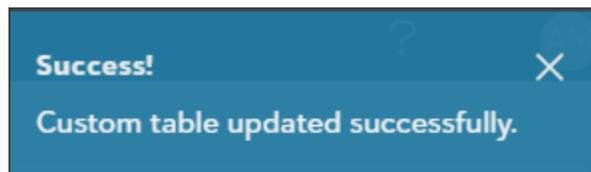


12) Now, it validates whether the custom table is used within any workflow or not. Refer to steps 12(a) and 12 (b).

12(a) If the Custom table is used in any of the Workflows, then it shows the “Custom table Already in use” dialog as shown below.



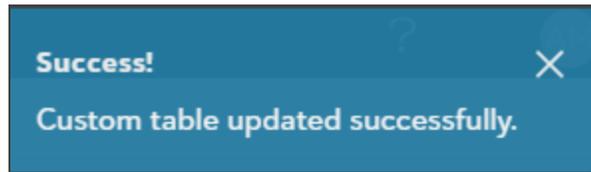
- If you click on the **Yes** option, a successful notification appears on the top-right corner of the screen and redirects to the Custom Tables list view page.



- If you click on the No option, the update operation gets cancelled and redirects to the Custom Tables list view page.

12(b) If the Custom table is not used in any of the Workflows, a successful notification appears on

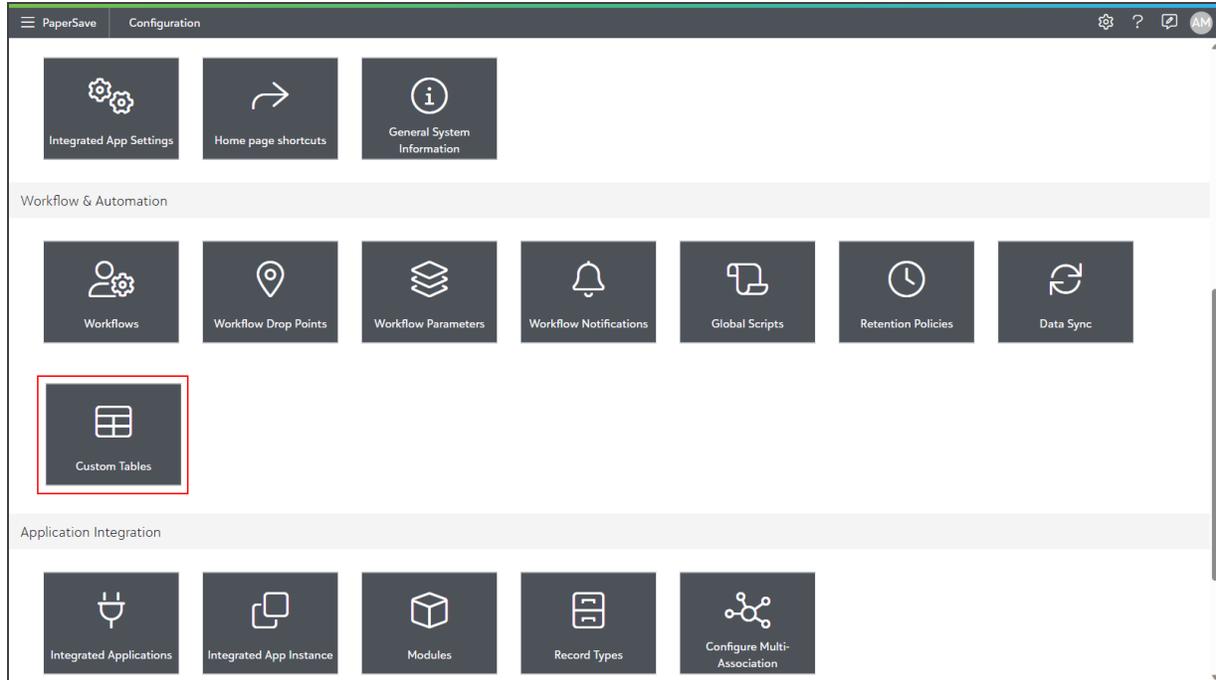
the top-right corner of the screen and redirects to the Custom Tables list view page.



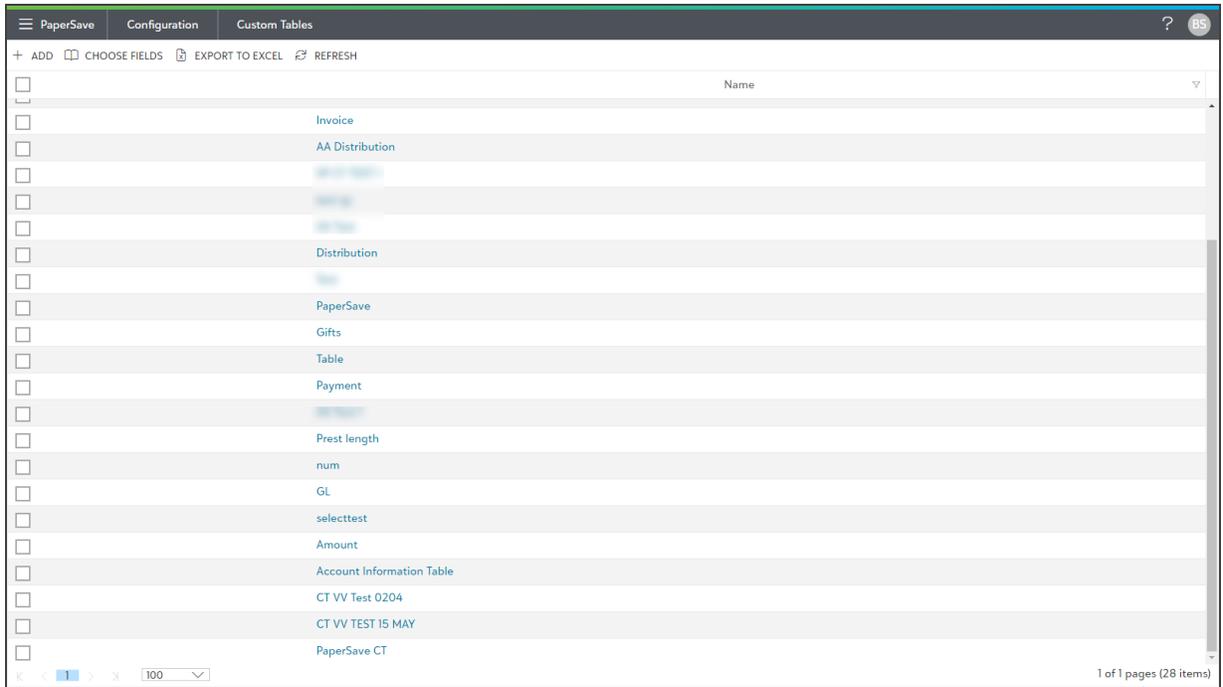
## Deleting the Custom Tables

Follow the below steps to delete the Custom Table:

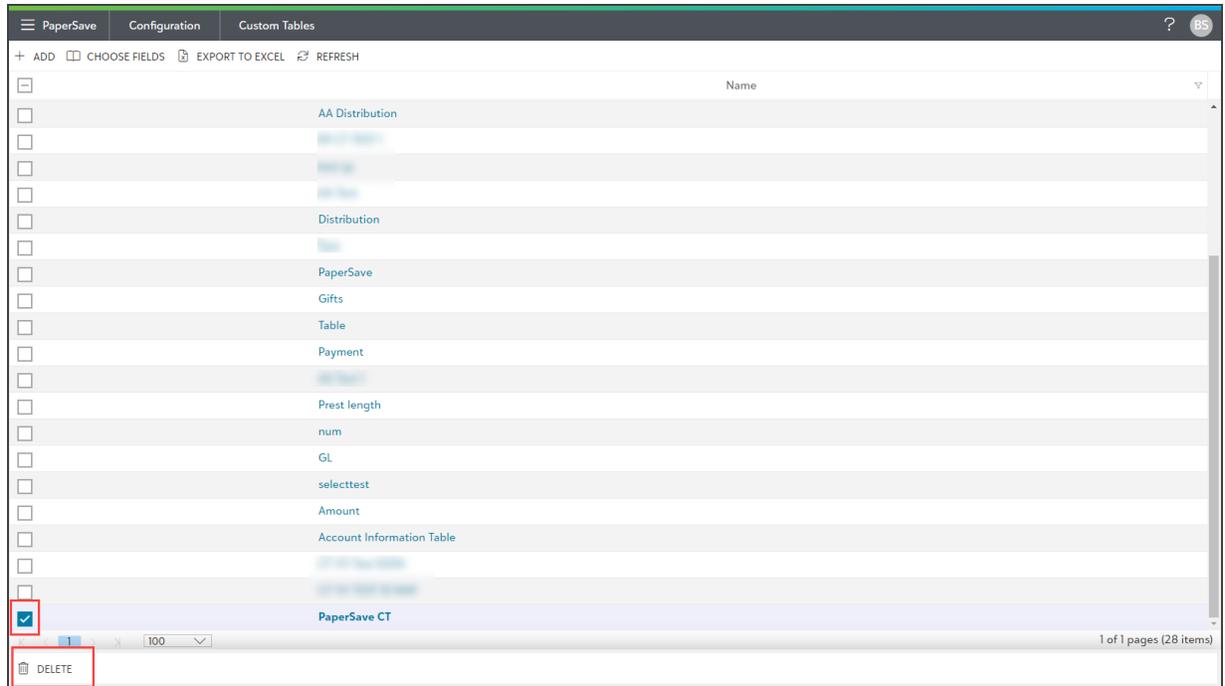
1) To delete the custom table, click on the **Custom Tables** tile in the **Workflow and Automation** section of the **Configuration Area**.



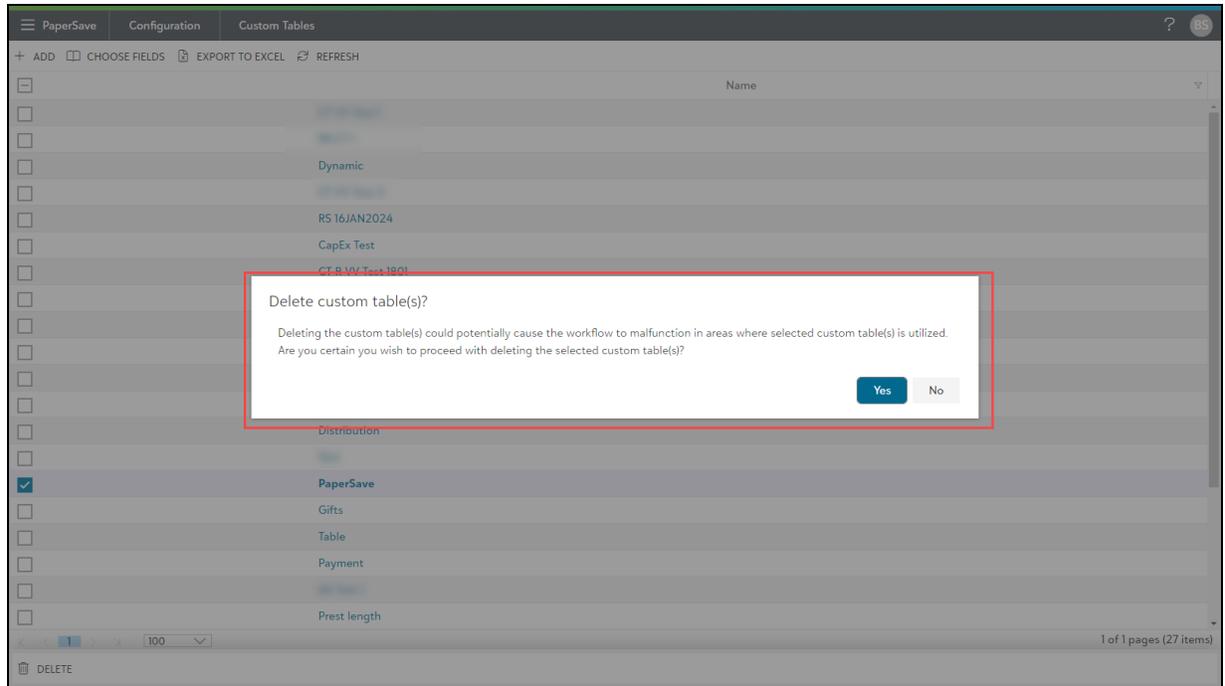
2) Now, the Custom Tables list view page opens, you can delete the Custom tables either from the list view page (as mentioned in step 3) or the details page (as mentioned in step 4).



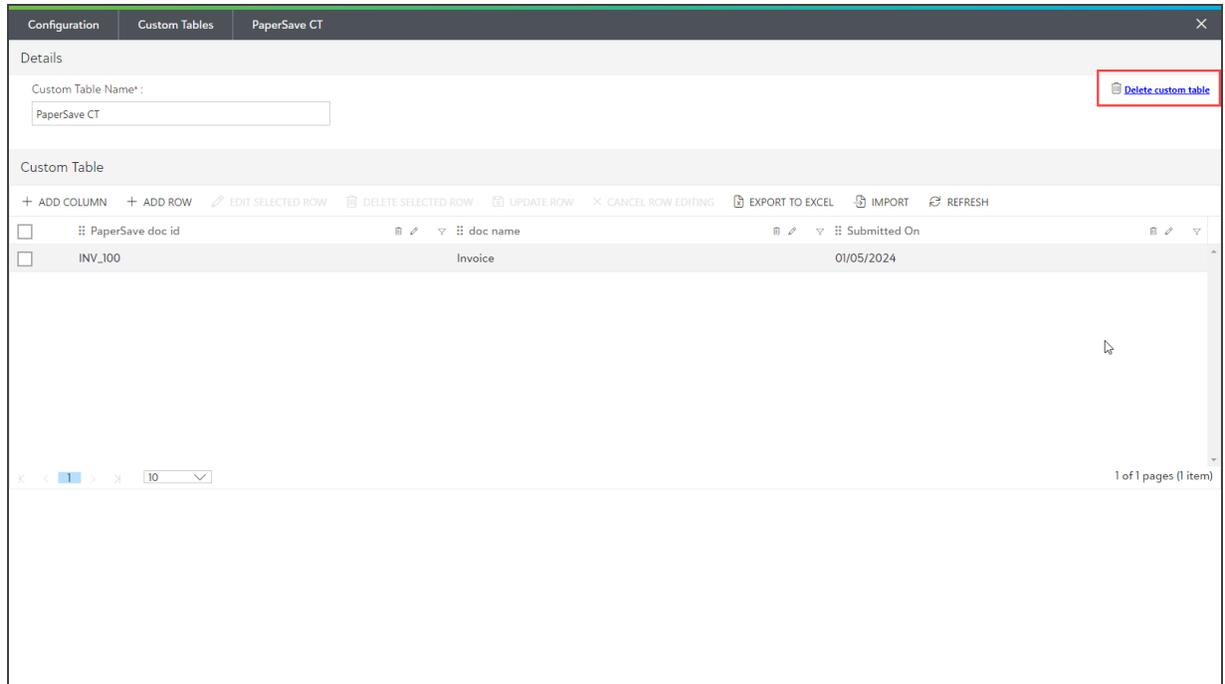
3) If you want to delete one or more Custom Tables, select the Custom Table(s) using the checkbox and then click on the **Delete** option from the slide-up panel as shown in the below screen.



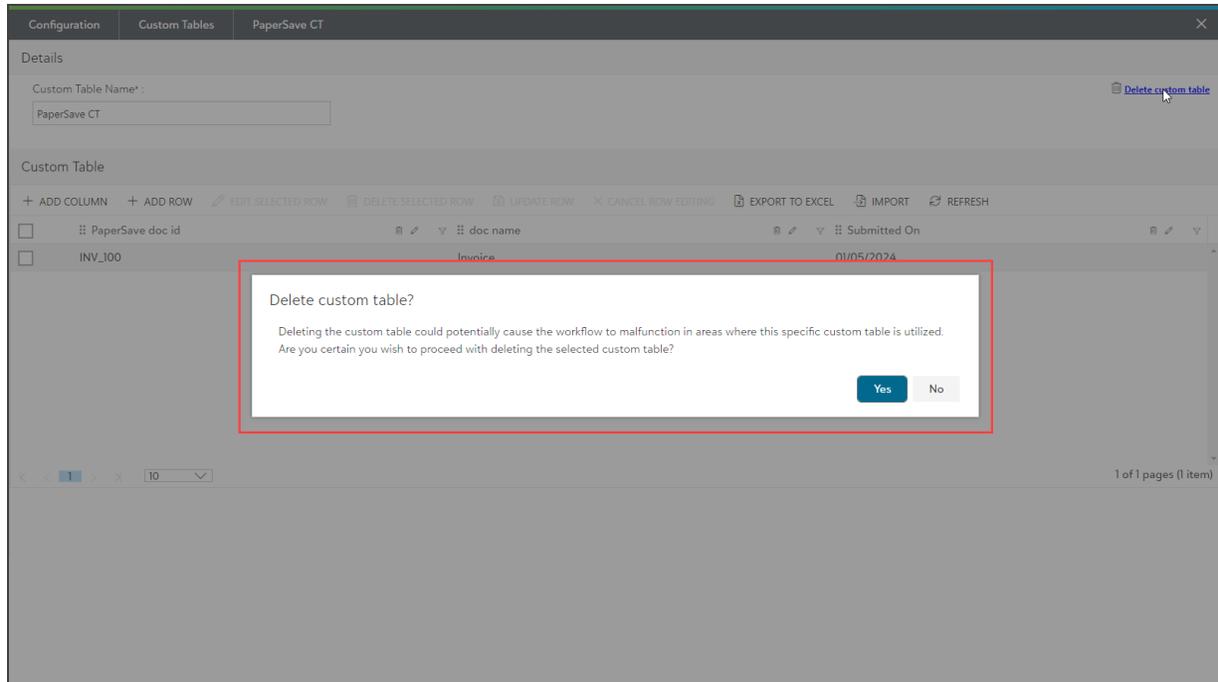
- Once you click on the **Delete** option, a confirmation message appears, as shown on the below screen where on clicking on the **Yes** it deletes the Custom Table and on **No** it discards the operation.



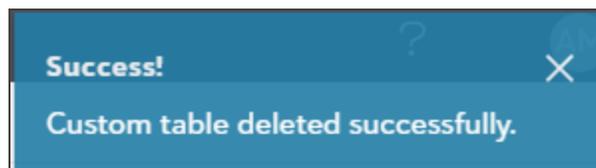
4) On the other hand, you can open any existing Custom Tables and click on the **Delete Custom Table** button within the full-page dialog box as shown in the below screen to delete a Custom Table.



- Once you click on the **Delete custom table** button, a confirmation message appears, as shown on the below screen where on clicking on the **Yes** it deletes the Custom Table and on **No** it discards the operation.



5) On clicking the **Yes** option, the custom table gets deleted successfully as shown below.



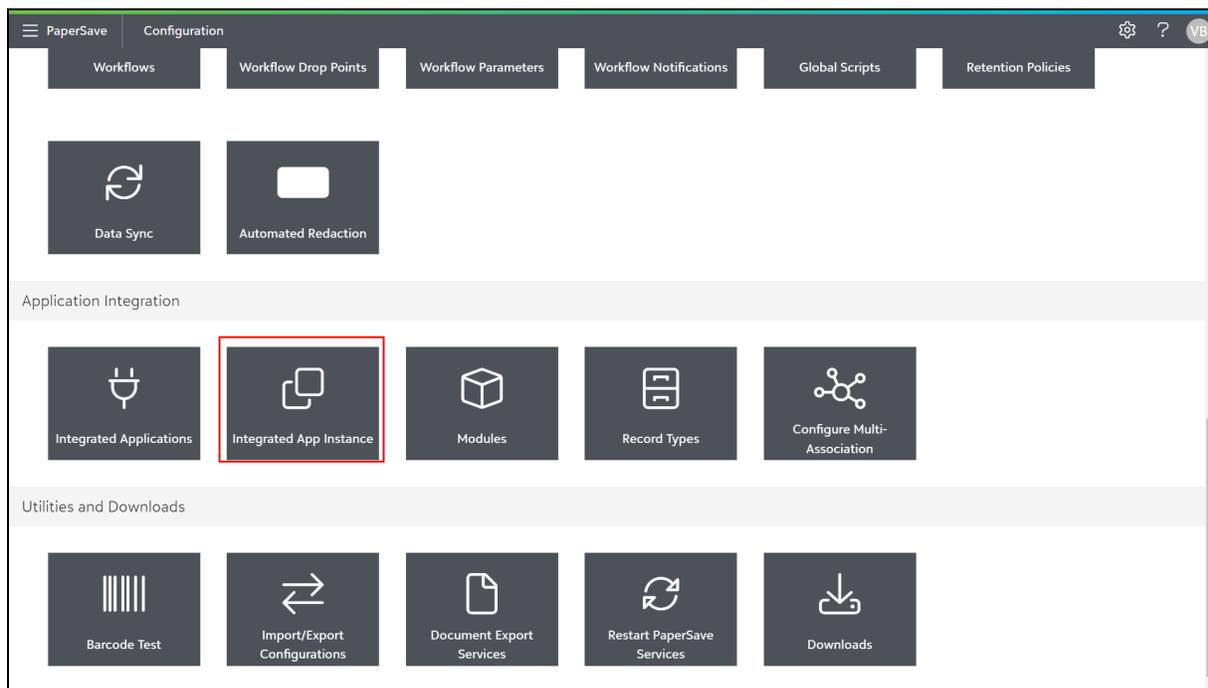
## Application Integration

The following topics are covered in Application Integration:

- [Integrated App Instances](#)
- [Record Types](#)

## Integrated App Instances

PaperSave allows you to register/deregister and manage one or more integrated app instances related to your integrated application within PaperSave by using different data connections. The Integrated App Instances module can be accessed from the Application Integration section in the Configuration Area.



The following sections will show you how to add, manage or delete the integrated app instances:

- [Adding Integrated App Instance](#)
- [Managing Integrated App Instance](#)
- [Deleting Integrated App instance](#)

## List Toolbar options in Integrated App Instance

The following are the list toolbar options available in Integrated App Instance:

- **+ADD:** You can create a new integrated app instance.
- **CHOOSE FIELDS:** You can set desired preferences for the fields to be displayed in the current list of Integrated App Instances using [Choose Fields](#).
- **EXPORT TO EXCEL:** You can export the current list of all integrated app instances to Microsoft Excel Sheet.
- **REFRESH:** You can get the updated list of integrated app instances.

## Adding Integrated App instance

The following sections will show how to add integrated app instance using various Data Connections:

- [Adding Integrated App Instance using SQL Server](#)
- [Adding Integrated App Instance using Data Access Service](#)
- [Adding Integrated App Instance using Blackbaud SKY API](#)
- [Adding Integrated App Instance using Web API](#)

## Adding Integrated App instance using SQL Server

Watch the [video](#) to know the steps to add an integrated app instance by using Data Connection Type as **SQL Server**.

## Adding Integrated App instance using Data Access Service

Watch the [video](#) to know the steps to add an integrated app instance by using Data Connection Type as **Data Access Service**.

## Adding Integrated App instance using Web API

Watch the [video](#) to know the steps to add an integrated app instance by using Data Connection Type as **Web API**.

**Note:** If you are adding company for the proxy user then, use Personal Access token as the password, and name entered for Personal access token as Username.

## Adding Integrated App instance using Blackbaud SKY API

Watch the [video](#) to know the steps to add an integrated app instance by using Data Connection Type as **Blackbaud SKY API**.

## Managing Integrated App Instance

Watch the [video](#) to know how to manage an Integrated App Instance.

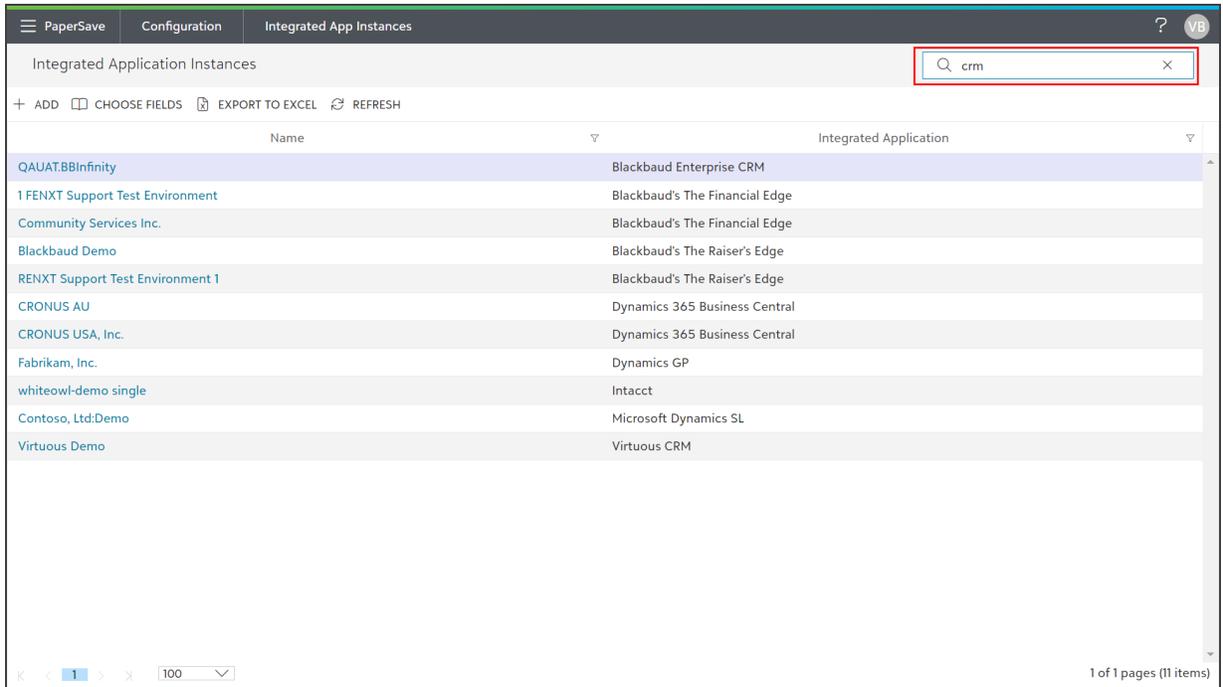
**Tip:** To save the updated value, you can click on **X**, press **Esc** from the keyboard, or click on the **Integrated App Instances** from the breadcrumbs available in the application bar.

## Deleting Integrated App Instance

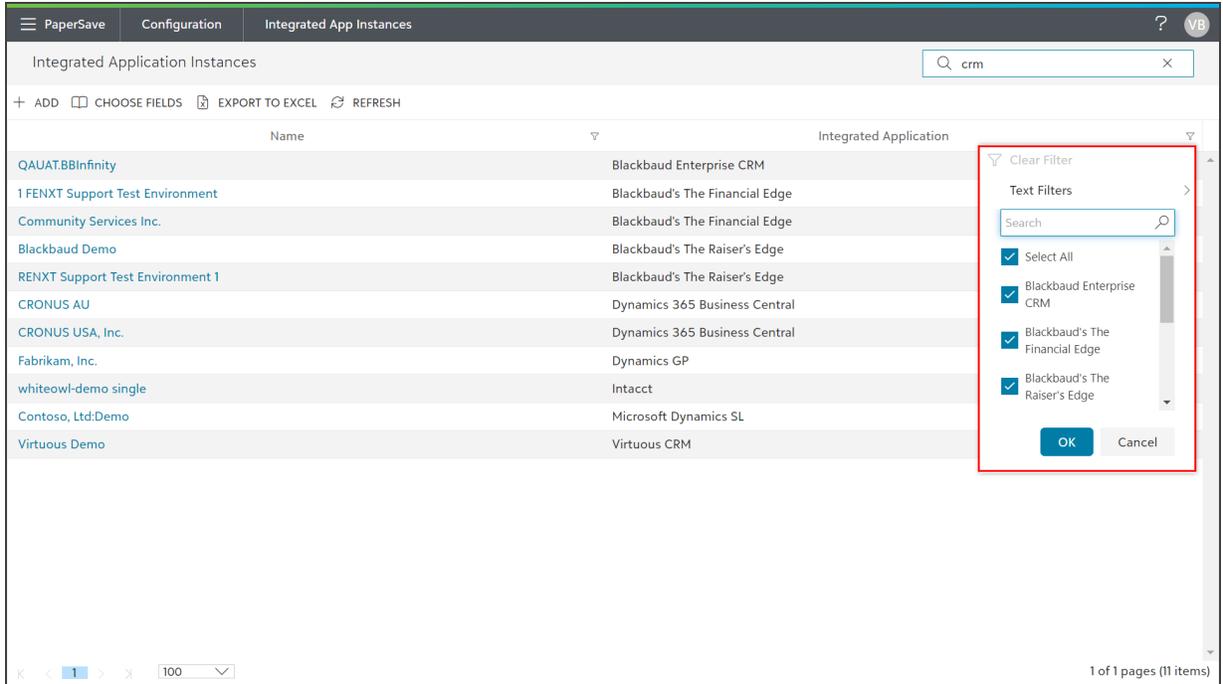
Follow the below steps to delete an Integrated App Instance:

- 1) Click on **Integrated App Instance** in the Application Integration section of the Configuration Area.

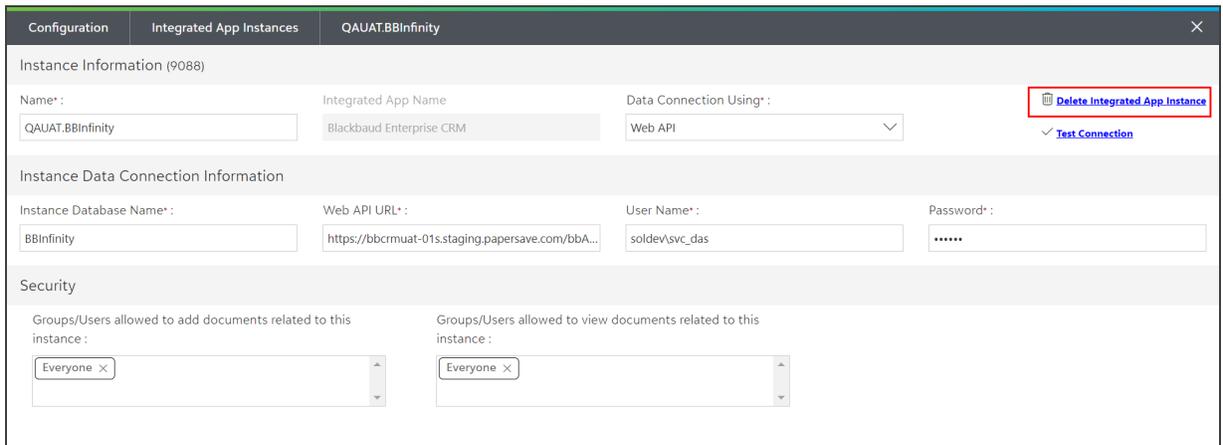
2) You can select the desired integrated app instance from the list or enter the keyword in a quick search to find the integrated app instance from the list as shown in the below screen.



- Also, you can use a column filter to narrow the search within the list of integrated app instances, as shown in the below screen.

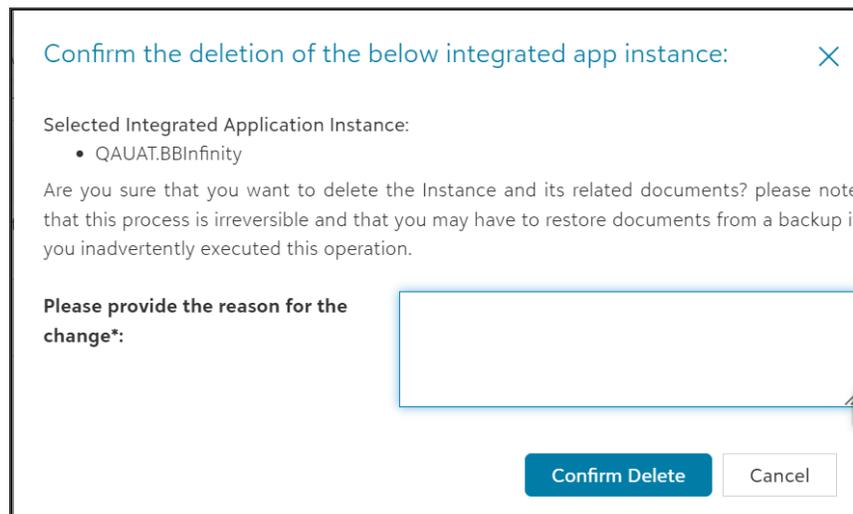


4) Now, click on the existing integrated app instance to open it in the edit mode and click on the **Delete Integrated App Instance** option within the full-page dialog box as shown in the below screen.



5) On clicking the **Delete Integrated App Instance** option, a dialog box will pop up. You must provide the appropriate reason to delete the integrated app instance and then, click on **Confirm Delete** option, as shown in the below screen.

**Note:** PaperSave includes the reason for the deletion of an instance in the audit log.

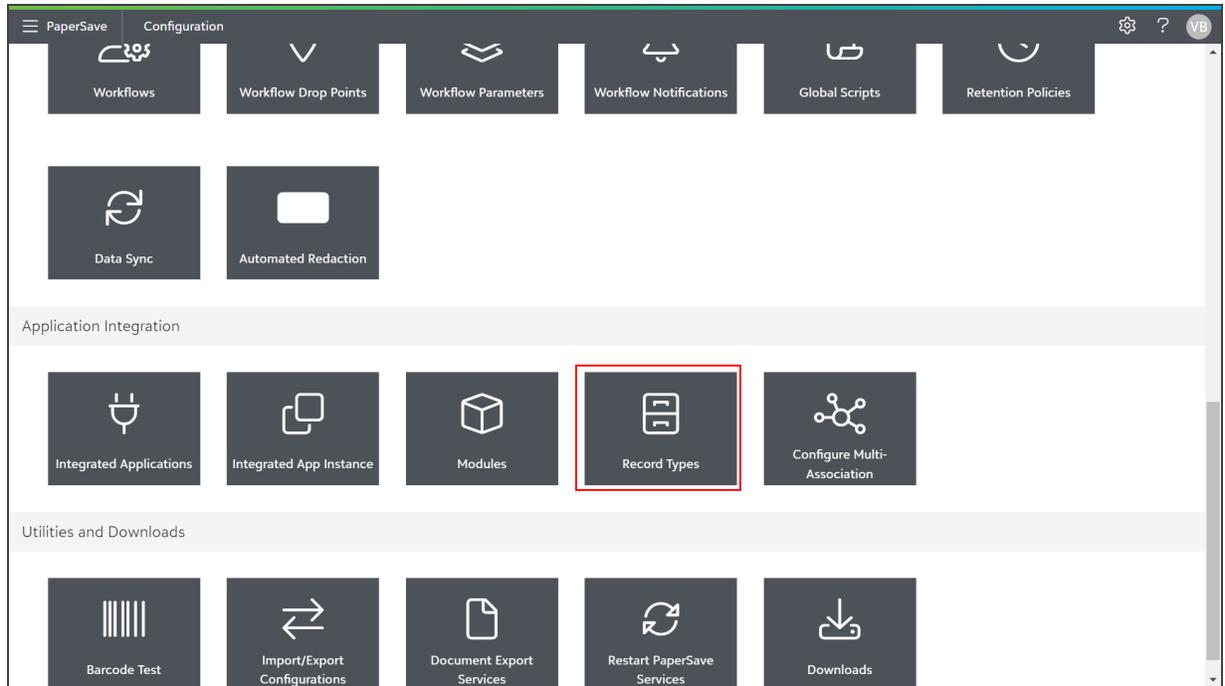


The screenshot shows a dialog box titled "Confirm the deletion of the below integrated app instance:". It contains the following text: "Selected Integrated Application Instance:" followed by a bullet point "• QAUAT.BBInfinity". Below this, it asks: "Are you sure that you want to delete the Instance and its related documents? please note that this process is irreversible and that you may have to restore documents from a backup if you inadvertently executed this operation." There is a text input field with the label "Please provide the reason for the change\*:". At the bottom, there are two buttons: "Confirm Delete" (in blue) and "Cancel" (in white).

6) You will see a notification (in the top right corner of the screen) based on the success/failure of the delete operation.

## Record types

PaperSave allows you to add and manage one or more record types related to your integrated application within PaperSave by using different data retrieval methods. Record Types module can be accessed from the Application Integration section in the Configuration Area.



The following sections will show you how to add, manage or delete the record types:

- [Adding Record Type](#)
- [Managing Record Type](#)
- [Deleting Record Type](#)

## List Toolbar options in Record Types

The following list toolbar options are available in Record Types:

- **+ADD:** You can create a new record type.
- **CHOOSE FIELDS:** You can set desired preferences for the fields to be displayed in the current list of record types using Choose Fields.
- **EXPORT TO EXCEL:** You can export the current list of all record types to the Microsoft Excel Sheet.
- **REFRESH:** You can get the updated list of record types.

## Adding Record Type

The following sections in the Add record types will show how to add the record type using different Data Connections:

- [Adding Record type using 'By SQL Against App Instance Connection'](#)
- [Adding Record type using 'By API Using App Instance Connection'](#)
- [Adding Record type using 'No Back-end Data Retrieval Necessary'](#)

### Adding Record type using 'By SQL Against App Instance Connection'

Watch the [video](#) to know the steps to add a record type by using data retrieval method as **SQL**.

## Adding Record type using 'By API Using App Instance Connection'

Watch the [video](#) to know the steps to add a record type by using data retrieval method as **API**.

## Adding Record type using 'No Back-end Data Retrieval Necessary'

Watch the [video](#) to know the steps to add a record type by using **No Back-end Data Retrieval Necessary**.

## Managing Record Type

Watch the [video](#) to know how to manage a Record Type.

**Tip:** To save the updated values, you can click on **X**, press **Esc** from the keyboard, or click on the **Record Types** from the breadcrumbs available in the application bar.

## Deleting Record Type

You can delete the Record Types by using the following two ways:

- 1) Select one or more Record types from the list by using the checkbox or directly selecting the rows and then, click on the **Delete** option from the slide-up panel as shown in the below screen.

PaperSave Configuration Record Types

Integrated Application Record Types

Search within List

+ ADD CHOOSE FIELDS EXPORT TO EXCEL REFRESH

	Name	Integrated Application	Module
<input checked="" type="checkbox"/>	Appeal Mail List	Blackbaud Enterprise CRM	Records
<input type="checkbox"/>	Committee	Blackbaud Enterprise CRM	Records
<input type="checkbox"/>	Constituent	Blackbaud Enterprise CRM	Records
<input type="checkbox"/>	Event	Blackbaud Enterprise CRM	Records
<input type="checkbox"/>	Membership	Blackbaud Enterprise CRM	Records
<input type="checkbox"/>	Planned Giving	Blackbaud Enterprise CRM	Records
<input type="checkbox"/>	Prospect Plan	Blackbaud Enterprise CRM	Records
<input type="checkbox"/>	Purpose	Blackbaud Enterprise CRM	Records
<input type="checkbox"/>	Interaction	Blackbaud Enterprise CRM	Transactions
<input type="checkbox"/>	Membership Installment Plan	Blackbaud Enterprise CRM	Transactions
<input type="checkbox"/>	Naming Opportunity	Blackbaud Enterprise CRM	Transactions
<input type="checkbox"/>	Opportunity	Blackbaud Enterprise CRM	Transactions
<input type="checkbox"/>	Revenue	Blackbaud Enterprise CRM	Transactions
<input type="checkbox"/>	Credit Memo	Blackbaud's The Financial Edge	Accounts Payable
<input type="checkbox"/>	Invoice	Blackbaud's The Financial Edge	Accounts Payable

DELETE

2) On the other hand, you can open any existing Record type and click on the **Delete Record Type** button within the full page dialog box as shown in the below screen to delete a Record Type.

Configuration Record Types Appeal Mail List

Details

Integrated Application\*: Blackbaud Enterprise CRM Name\*: Appeal Mail List **Delete Record Type**

Module\*: Records How is Data Retrieved for this Record Ty...: By SQL Against App Instance Connection

App Instance: [Dropdown]

Source Command

```

1 SELECT CONVERT(varchar(100),APPEALMAILING.ID) AS ParentID,CONVERT(varchar(100),APPEALMAILING.ID) AS
[Appeal Mail List ID],APPEALMAILING.NAME AS [Appeal Mail List],APPEALNAME AS [Appeal],
MKTPACKAGE.NAME AS [Package],IDSETREGISTER.NAME AS [Selection],ISNULL(MKTSEGMENTATION.MAILDATE,')
AS [Mail Date],MKTSEGMENTATION.BUDGET.FIXEDCOST AS [Fixed Cost],MKTSEGMENTATION.BUDGET.AMOUNT AS
[Budget],CASE MKTSEGMENTATION.ACTIVE WHEN 1 THEN 'Yes' ELSE 'No' END AS [Activated] FROM
APPEALMAILING LEFT JOIN APPEAL ON APPEAL.ID = APPEALMAILING.APPEALID LEFT JOIN
MKTSEGMENTATIONSEGMENT ON MKTSEGMENTATIONSEGMENT.ID = APPEALMAILING.MKTSEGMENTATIONSEGMENTID LEFT
JOIN MKTPACKAGE ON MKTPACKAGE.ID = MKTSEGMENTATIONSEGMENT.PACKAGEID LEFT JOIN MKTSEGMENTATION ON
MKTSEGMENTATION.ID = MKTSEGMENTATIONSEGMENT.SEGMENTATIONID LEFT JOIN MKTSEGMENTATIONBUDGET ON
MKTSEGMENTATIONBUDGET.ID = MKTSEGMENTATIONSEGMENT.SEGMENTATIONID LEFT JOIN MKTSEGMENTSELECTION ON
MKTSEGMENTSELECTION.SEGMENTID = MKTSEGMENTATIONSEGMENT.SEGMENTID LEFT JOIN IDSETREGISTER ON
MKTSEGMENTSELECTION.SELECTIONID = IDSETREGISTER.ID

```

Wrap Text

Undo Change Copy Original Source Command

**Note:** PaperSave includes the reason for the deletion of a Record Type in the Audit Log and currently delete operation in Record Type is under development and will be updated soon.

## Utilities and Downloads

The following topics are covered in Utilities and Downloads:

- [Barcode Test Utility](#)
- [Restart PaperSave Services](#)

### Barcode Test Utility

When adding documents separated by barcode coversheets, there may be a situation where a barcode is in a non-readable form, and the document is not attached to the record.

The Barcode Test Utility offers a mechanism to determine if the file contains a valid PaperSave barcode with pre-processing options to enhance the barcode while testing. You can also generate a test page with a valid PaperSave barcode to make sure that barcodes are processed correctly.

Watch the [video](#) to know how to use the Barcode Test Utility to check if a valid PaperSave Barcode is detected or not in a specific file.

## Restart PaperSave Services

PaperSave Configuration Area allows you to re-initiate the PaperSave Services such as Drop Point Processing Services and Timer Service from the Utilities and Downloads Section.

You can learn to restart one or more PaperSave Services from the [video](#).

**Tip:** PaperSave Timer Service and Drop Point processing service manages a list of operations or actions in PaperSave. If PaperSave Timer service or Drop Point service stops, then your PaperSave Administrator can restart these services so that the operations related to each service work properly.

## Drop Point Processing Service

Drop Point Processing service is used to monitor the automated ways of dropping documents or batches of documents into PaperSave using ScanLater/Recapture stack or below mentioned Drop Points.

- ScanLater™ network watch folder
- Email Box type Workflow Drop Point

## Timer Service

Timer Service handles the following operations in PaperSave:

### Refresh Cache

- Send Workflow Item Single Notification
- Send Workflow Item Group Notification
- Audit Log Back up
- Update Workflow User Tag
- Data Sync
- Thumbnail Sync
- Update Integrated Application Information
- Delete Completed Workflow Item
- DAS (Data Access Service) Password Expiration Check

# Forms Area

## Welcome to PaperSave Forms Area

PaperSave Forms offers an efficient way to manage documents and data by allowing users to create digital forms for submitting invoices, bills, and other documents. These forms can store information, integrate with workflows, and be exported to various formats like PDF and DOCX. By simplifying and streamlining paper-work and data management, PaperSave Forms enhances organizational efficiency.

This section is designed to get the audience up and running with PaperSave Forms Area. You can learn about the key features and functionalities of our all new PaperSave Forms Area.

You can explore the following topic within Forms Area:

- [Accessing Smart Forms](#)
- [Viewing Workflow items submitted via Smart Forms](#)
- [Modifying the Smart form values](#)

## Accessing Smart Forms

Once the Smart Forms are created within the Workflow section, they can be accessed by the respective users from the "Forms Area" in PaperSave to fill in the details and submit the form as a Workflow item to the respective Workflow.

Follow the below steps to access a Smart Form:

1) Click on PaperSave navigation menu from the top left corner in the application bar. Now, select **Forms** from the list, as shown in the below screen.

Home	CHOOSE FIELDS	EXPORT TO EXCEL	REFRESH				
Acquire	Integrated App	Module	Document Type	Record Type	Published		
Workflow Design	Blackbaud Enterprise CRM	Records	Appeal Mail List Documentation	Appeal Mail List	No		
Workflow Design	Blackbaud Enterprise CRM	Records	Appeal Mail List Documentation	Appeal Mail List	No		
Expense Processing	Blackbaud Enterprise CRM	Records	Purpose Documentation	Purpose	Yes		
Revenue Entry	Blackbaud Enterprise CRM	Transactions	Revenue Documentation	Revenue	No		
Revenue Entry	Blackbaud Enterprise CRM	Transactions	Revenue Documentation	Revenue	Yes		
Revenue Entry With Check	Blackbaud Enterprise CRM	Transactions	Revenue Documentation	Revenue	Yes		
Revenue Entry With Check	Blackbaud Enterprise CRM	Transactions	Revenue Documentation	Revenue	Yes		

2) Now, it navigates you to the Workflow Forms Area where you will see a list of all the Forms organized by their respective Workflow. Click on the form name to open it.

PaperSave Workflow Forms

**FE Invoice Data Entry**

Form Name  
pam test

**GP Invoice DataEntry**

Form Name

**FE Expense Processing**

Form Name  
FE Expense and Invoice Submission

**GP Expense Processing**

Form Name  
GP Expense and Invoice Submission

**RE Gift Processing**

Form Name  
RE Gift Transmittal Form

4) Enter the required details in the Smart Form.

Some University Donation Remittance

Submit

Vrunda Bhalani

Donation

Source

# Donation Remittance Form

Development and Alumni Engagement  
1010-1234 University Blvd.  
Some College Town, FL 33123

**Form Instruction:**  
Please ensure that all supporting materials are attached.

Executive Director Approval:

Donation Details

Donor: [Text Field] [Search Icon]

Constituent ID: [Text Field]

Amount \$: [Text Field] \$ 0.00

Date: [Text Field]

Type Code: [Text Field] 1

Designation: [Text Field] [Search Icon]

Attributes:  Anonymous Gift  Sponsorship

Acknowledgement:  Tax Receipt  External Award Acknowledgement  Business Acknowledgement  None

5) Now, there are various options available in the top-right corner of the screen, as shown in the below screen. The following is a description of each option.

a) **Attach File** : This option allows you to attach one or more PDF or image files with the current Smart Form. Click on the "**Attach**" icon that opens a dialog box to attach the files. Click on the **Browse Files** and attach PDF/Image files that you wish to attach.

Some University Donation Remittance

Submit

Vrunda Bhalani

Donation

Source

Development an  
1010-1234 Univers  
Some College To

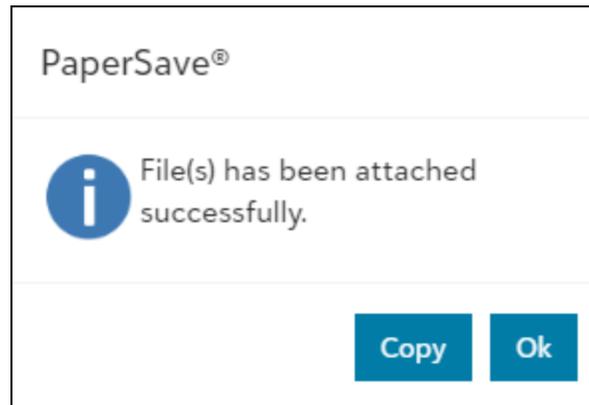
### Attach Files

Select the Pdf file(s) or Image(s) you would like to attach. The attachments will appear as additional pages at the end of this form in the order they were uploaded.

**Browse Files**

- Once the file is successfully attached, a confirmation dialog box pops up, as shown in the below screen. Click on the **Ok** button to close the dialog box and click on "X" to close Attach Files dialog box. You may

also click on the **Delete**  button to remove the attached file(s).



- Click on the **Submit** button to submit the form. Doing so, Form Submission Preview is available for your review. Scroll down to view the attached files. The form will highlight the mandatory fields that are not filled. You can anytime go back by clicking the " × " to fill the required fields. Once all details are filled, click the **Submit** button on the Form Submission Preview.

Please review the form prior to submission, then press submit.

Vendor Details

Transaction Date

29/12/YYYY

Vendor

Accelcia Business Service Inc

Pay To Contact

Accelcia Business Service Inc

Return To Contact

Accelcia Business Service Inc

Basic Details

Payment terms

Net 60

Vendor Document Number

Vdoc

Message

Due Date

29/12/YYYY

Reference Number

Company

demo12829676

Line Items Details

LineItems

Product Code ID	Quantity	Price	Unit	Descripti	Location	Warehou Id	Employe Id	MEMO	Departm Id	Actions
CPU	1	\$ 10.00	Each	desc	Clermont	Secondar	-- Select --			

Attached File(s)

[Northwind Traders 10979 2way.pdf](#)

[Rallye Productions 50080 2way.pdf](#)

- If any mandatory fields are not filled, then such fields will be highlighted, and the **Submit** button will be disabled, as shown in the below screen.

Form Submission Preview
Submit
×

Please review the form prior to submission, then press submit.

---

**Vendor Details**

<b>Transaction Date</b>	<b>Vendor</b>	<b>Pay To Contact</b>	<b>Return To Contact</b>
<input type="text" value="29/12/YYYY"/>	<input type="text" value="-- Select --"/>	<input type="text" value="-- Select --"/>	<input type="text" value="Accelcia Business Service Inc"/>

---

**Basic Details**

<b>Payment terms</b>	<b>Vendor Document Number</b>	<b>Message</b>
<input type="text" value="-- Select --"/>	<input type="text" value="vdoc"/>	<input type="text"/>
<b>Due Date</b>	<b>Reference Number</b>	<b>Company</b>
<input type="text" value="29/12/YYYY"/>	<input type="text"/>	<input type="text" value="demo12829676"/>

---

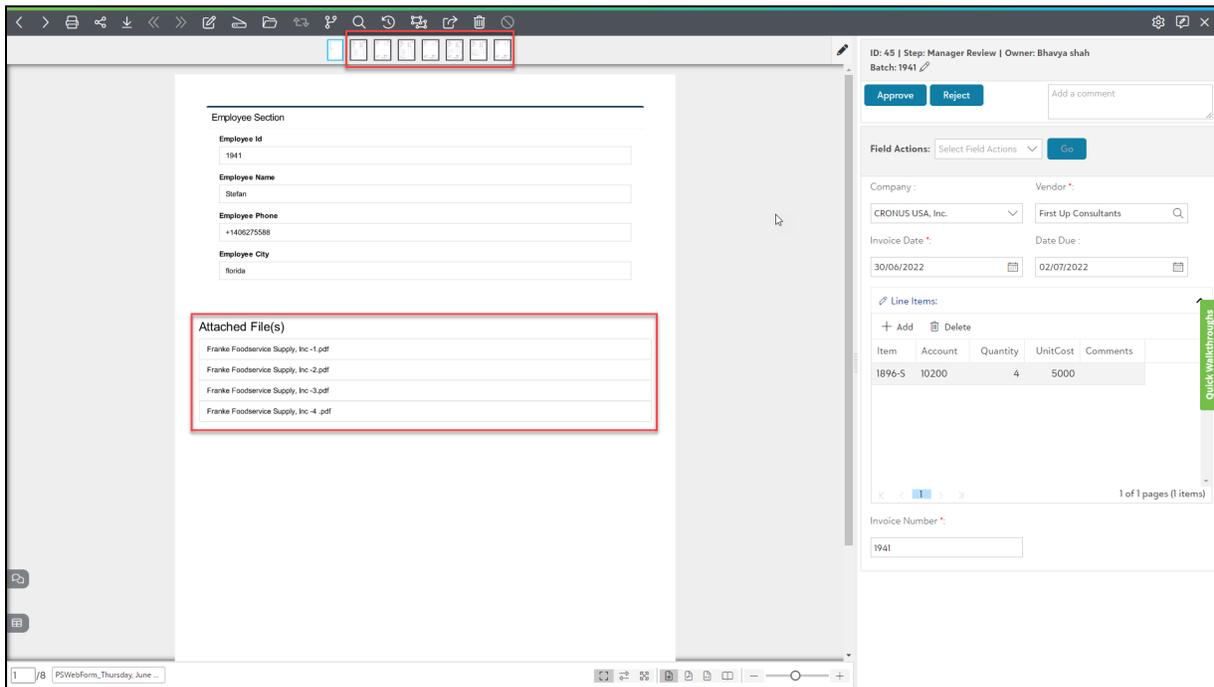
**Line Items Details**

Product Code ID	Quantity	Price	Unit	Description	Location	Warehouse Id	Employee Id	MEMO	Department Id	Actions

- Once you enter all the required fields, the **Submit** option will be enabled. Once the Smart Form is submitted successfully, a confirmation dialog box pop-up, as shown in the below screen.



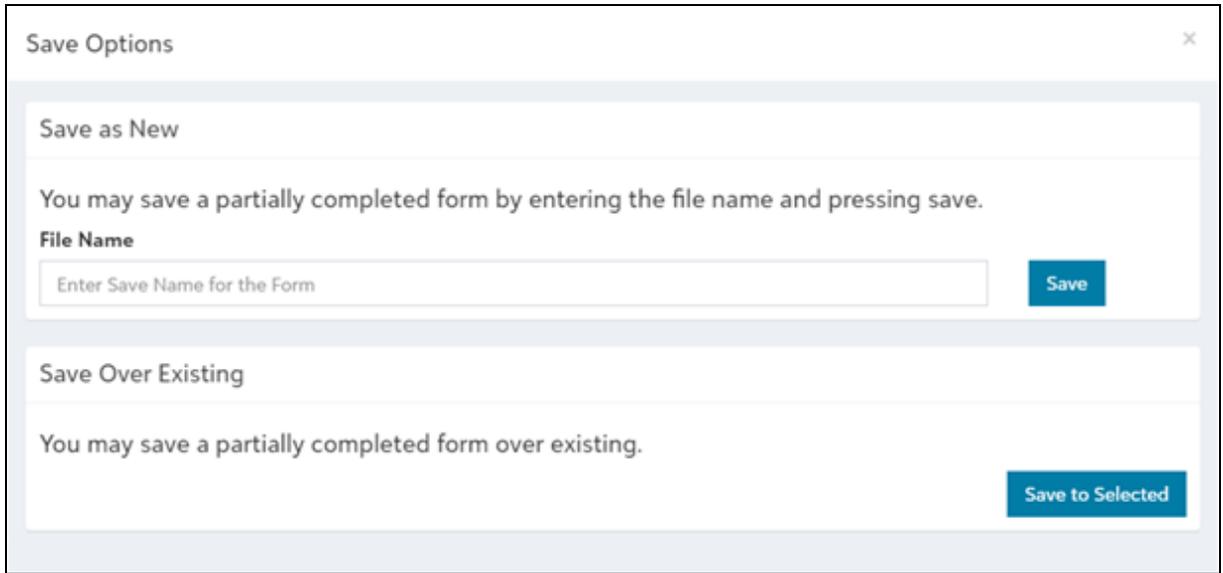
- The form is submitted. You can access the form from Workflow. The form will be displayed as shown in the below screen. The attachments filename are displayed at the bottom of the Smart Form page and the attached documents gets merged with the Smart form document. You can click on the pages from the thumbnail to view the attached files.



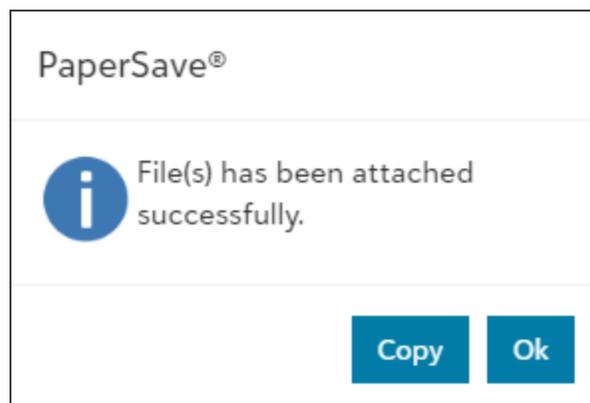
b) **Save Options:**

This option allows you to save certain field values which could be used by other users to autofill the fields in the form.

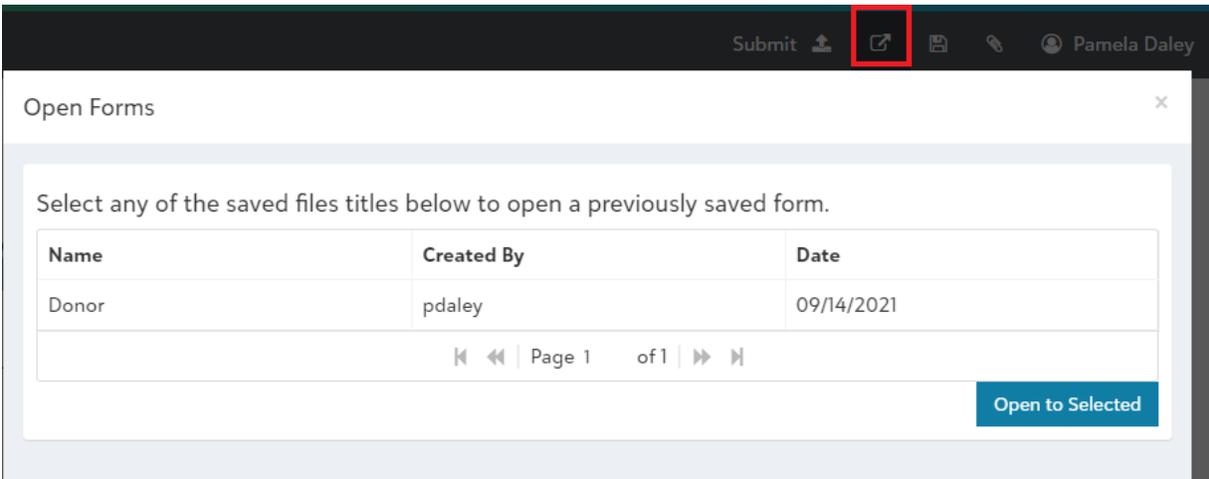
- Click on the **Save** button to open a dialog box, as shown in the below screen.



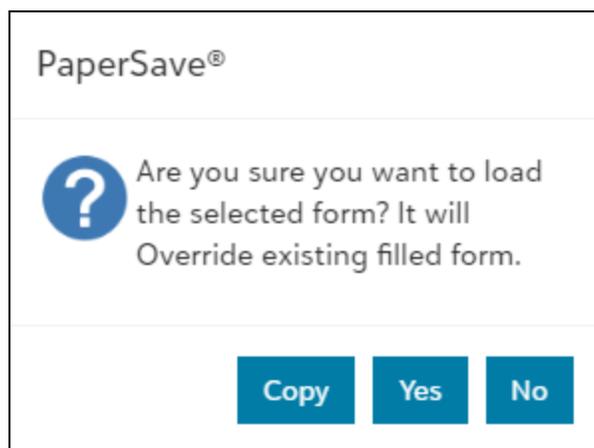
- Enter the desired name in File name option to save the partially filled form. Also, you can click on "**Save to Selected**" to save partially completed form over the existing form.
- Once the file is saved successfully, a confirmation dialog box will pop up as shown in the below screen.



c) **Open Save Files** : This option allows you to view a list of saved forms with the details such as Name, Date, and Created by.



- Select the form from the list and click on **Open to Selected** option to auto-fill the saved field values in the current form.
- When you click on Open to Selected option, a confirmation dialog box will pop-up. Click on **Yes** to override the saved field values.

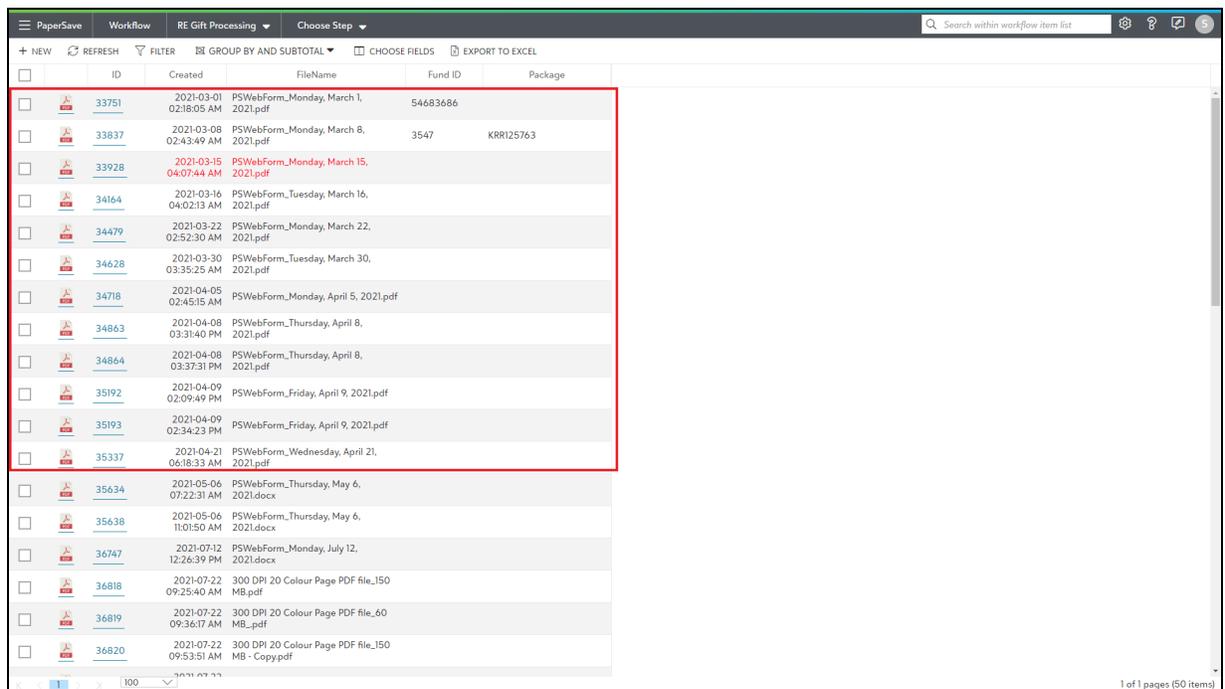


**Note:** 'Save Options' and 'Open Saved Files' options will be available only for Private Smart Forms.

## Viewing Workflow items submitted via Smart Forms

You can view the Workflow items that are submitted using the smart forms from within the Workflow Area. Follow the below steps to view the Workflow items.

- 1) **Navigate** to the Workflow Area.
- 2) **Choose** the desired Workflow which contains Workflow items submitted via Smart form(s). You will see a list of Workflow items submitted via smart form, as shown in the below screen.



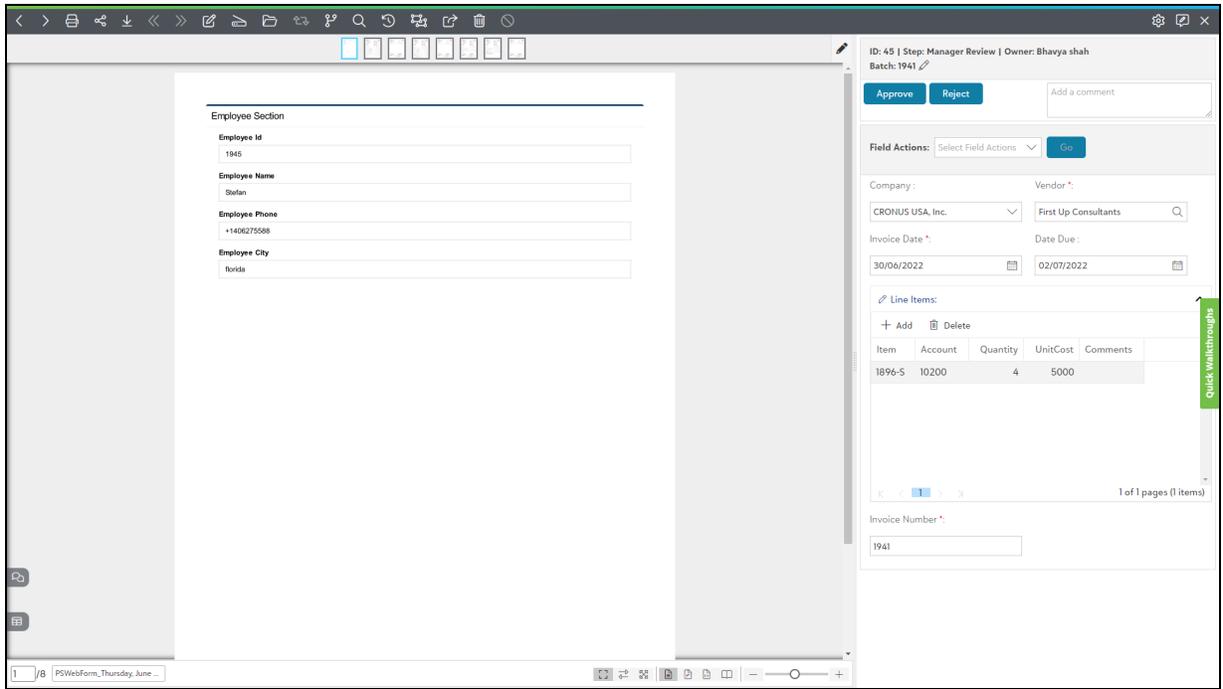
	ID	Created	FileName	Fund ID	Package
<input type="checkbox"/>	33751	2021-03-01 02:18:05 AM	PSWebForm_Monday, March 1, 2021.pdf	54683686	
<input type="checkbox"/>	33837	2021-03-08 02:43:49 AM	PSWebForm_Monday, March 8, 2021.pdf	3547	KRR125763
<input type="checkbox"/>	33928	2021-03-15 04:07:44 AM	PSWebForm_Monday, March 15, 2021.pdf		
<input type="checkbox"/>	34164	2021-03-16 04:02:13 AM	PSWebForm_Tuesday, March 16, 2021.pdf		
<input type="checkbox"/>	34479	2021-03-22 02:52:30 AM	PSWebForm_Monday, March 22, 2021.pdf		
<input type="checkbox"/>	34628	2021-03-30 03:35:25 AM	PSWebForm_Tuesday, March 30, 2021.pdf		
<input type="checkbox"/>	34718	2021-04-05 02:45:15 AM	PSWebForm_Monday, April 5, 2021.pdf		
<input type="checkbox"/>	34863	2021-04-08 03:31:40 PM	PSWebForm_Thursday, April 8, 2021.pdf		
<input type="checkbox"/>	34864	2021-04-08 03:37:31 PM	PSWebForm_Thursday, April 8, 2021.pdf		
<input type="checkbox"/>	35192	2021-04-09 02:09:49 PM	PSWebForm_Friday, April 9, 2021.pdf		
<input type="checkbox"/>	35193	2021-04-09 02:34:23 PM	PSWebForm_Friday, April 9, 2021.pdf		
<input type="checkbox"/>	35337	2021-04-21 06:18:33 AM	PSWebForm_Wednesday, April 21, 2021.pdf		
<input type="checkbox"/>	35634	2021-05-06 07:22:31 AM	PSWebForm_Thursday, May 6, 2021.docx		
<input type="checkbox"/>	35638	2021-05-06 11:01:50 AM	PSWebForm_Thursday, May 6, 2021.docx		
<input type="checkbox"/>	36747	2021-07-12 12:26:39 PM	PSWebForm_Monday, July 12, 2021.docx		
<input type="checkbox"/>	36818	2021-07-22 09:25:40 AM	300 DPI 20 Colour Page PDF file_150 MB.pdf		
<input type="checkbox"/>	36819	2021-07-22 09:36:17 AM	300 DPI 20 Colour Page PDF file_60 MB.pdf		
<input type="checkbox"/>	36820	2021-07-22 09:53:51 AM	300 DPI 20 Colour Page PDF file_150 MB - Copy.pdf		

**Note:** The Workflow items submitted via Smart forms with output type "Smart form content" will have extension as ".pdf" (shown in the above screen), whereas the ones with output type "Word Mail Merge" will have extension of ".docx", as shown in the below screen.

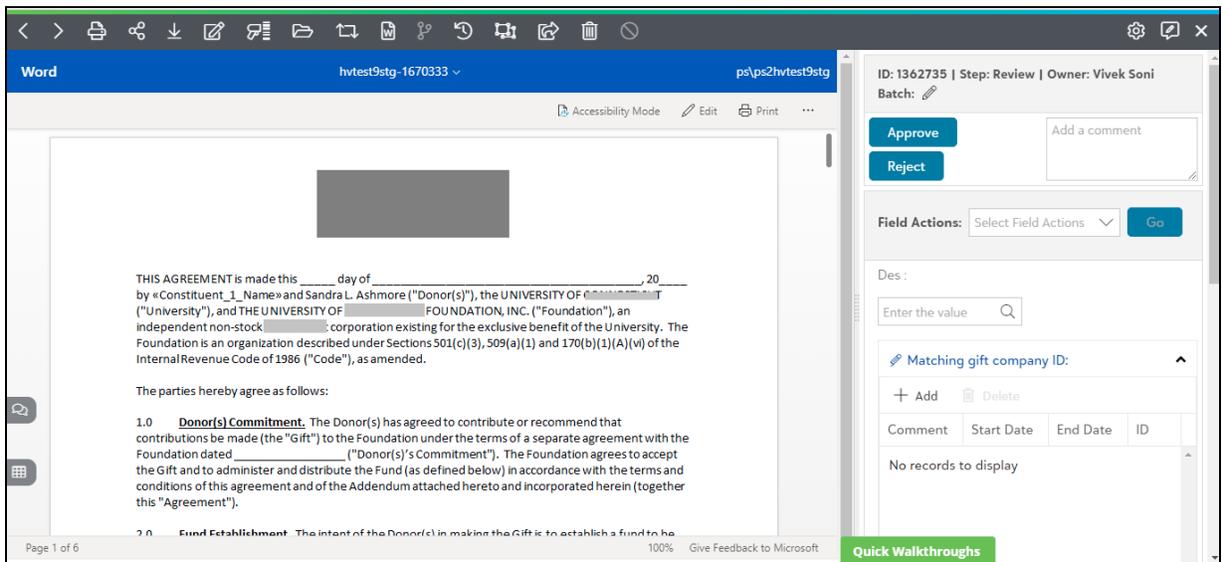
ID	Created	FileName	Fund ID	Package
33751	2021-03-01 02:18:05 AM	PSWebForm_Monday, March 1, 2021.pdf	54683686	
33837	2021-03-08 02:43:49 AM	PSWebForm_Monday, March 8, 2021.pdf	3547	KRR125763
33928	2021-03-15 04:07:44 AM	PSWebForm_Monday, March 15, 2021.pdf		
34164	2021-03-16 04:02:13 AM	PSWebForm_Tuesday, March 16, 2021.pdf		
34479	2021-03-22 02:52:30 AM	PSWebForm_Monday, March 22, 2021.pdf		
34628	2021-03-30 03:35:25 AM	PSWebForm_Tuesday, March 30, 2021.pdf		
34718	2021-04-05 02:45:15 AM	PSWebForm_Monday, April 5, 2021.pdf		
34863	2021-04-08 03:31:40 PM	PSWebForm_Thursday, April 8, 2021.pdf		
34864	2021-04-08 03:37:31 PM	PSWebForm_Thursday, April 8, 2021.pdf		
35192	2021-04-09 02:09:49 PM	PSWebForm_Friday, April 9, 2021.pdf		
35193	2021-04-09 02:34:23 PM	PSWebForm_Friday, April 9, 2021.pdf		
35337	2021-04-21 06:18:33 AM	PSWebForm_Wednesday, April 21, 2021.pdf		
35634	2021-05-06 07:22:31 AM	PSWebForm_Thursday, May 6, 2021.docx		
35638	2021-05-06 11:01:50 AM	PSWebForm_Thursday, May 6, 2021.docx		
36747	2021-07-12 12:26:39 PM	PSWebForm_Monday, July 12, 2021.docx		
36818	2021-07-22 09:25:40 AM	300 DPI 20 Colour Page PDF file_150 MB.pdf		
36819	2021-07-22 09:36:17 AM	300 DPI 20 Colour Page PDF file_60 MB.pdf		
36820	2021-07-22 09:53:51 AM	300 DPI 20 Colour Page PDF file_150 MB - Copy.pdf		

3) **Click** on the Workflow item (submitted via Smart form) to open it in the Workflow item viewer. You can see the submitted Workflow item via smart form, as shown in the below screen. Here, if there are any existing attachments or newly added attachments, then it gets displayed in the "Attachments" section below the top-level toolbar option.

**Tip:** Click [here](#) to learn more about the attachments within the Smart form.



- The following is an example of Workflow item (opened in the item viewer) with Smart form having the output type as "Word Mail merge".



## Adding/Managing the Attachments for the Smartform

**Note:** The new global setting "MergeSmartFormAttachmentToPDF" is added to Miscellaneous Settings.

### When set to "True":

--> Content with the following mime types gets merged to the form PDF for PaperSave 6 and 7.

*.pdf, .bmp, .jpg, .jpeg, .png, .gif*

--> Attachments other than the following mime types appears in the Attachments bar in PaperSave 7. For PaperSave 6, the attachment bar does not appear.

*.pdf, .bmp, .jpg, .jpeg, .png, .gif*

**When set to "False" (Default Value):** The attachments functionality works only for PaperSave 7, and the attachments with all PaperSave supported mime types (excluding, .eml and .msg) appear as links in the Attachments bar.

Now, you can easily add the attachments within the Smartform from the Workflow item viewer by using the "**Attachments**" functionality introduced in the top-level toolbar in the form of the "Paperclip" icon. Also, you can rename and delete the existing attachments with just a single right-click on the attachment's hyperlink in the Attachments section.

**Note:** To add/delete/rename the Attachment, you must have "Groups/Users that can edit item content into this workflow" rights in the Workflow or be a Workflow administrator.

Let's refer to the below two sections to understand how to add and manage the Attachment functionality for Smartform:

- [Adding the Attachments](#)
- [Viewing the Attachments](#)
- [Renaming/Deleting the Attachments](#)

**Warning:** Currently, Email mime type attachments, i.e., .eml, and .msg, cannot be added to smart form.

## Adding the Attachments

1) Open the submitted Smartform item in the Workflow item viewer. Here, if there are any existing attachments then the Attachments section appears as shown below.

The screenshot displays a web-based Smartform interface. The main form area contains several input fields with labels and asterisks indicating required fields:

- Request Type:\*** Expense Report
- AP Processor:\*** [Redacted]
- Requested By:\*** [Redacted]
- Company:\*** Support Test Environment 1
- Vendor/Employee:\*** A Good Company
- Remit To Address:\*** 48 Island Lakes Shore,
- Document Number:\*** VBD103
- Date:\*** [Empty]

The right-hand sidebar contains the following elements:

- Header: ID: 148931 | Step: AP Review | Owner: [Redacted]
- Batch: [Redacted]
- Buttons: Send to Reviewer, Add a comment, Submit
- Field Actions: Select Field Actions, Go
- Company: Support Test Environm..., CompanyID: [Redacted]
- Reviewers section:
 

Name	Reviewer	Status
No records to display		
- Approval Status: Pending
- Vendor: A Good Company
- VendorID: [Redacted]
- Remit to ID: 48 Island Lakes Shore,

2) Now, click on the  Paperclip icon as shown below to add an attachment.

**Note:** This icon enables only for the submitted Smartform in a Workflow item viewer.

The screenshot displays a web application interface for reviewing a Smartform submission. The main area contains a form with the following fields:

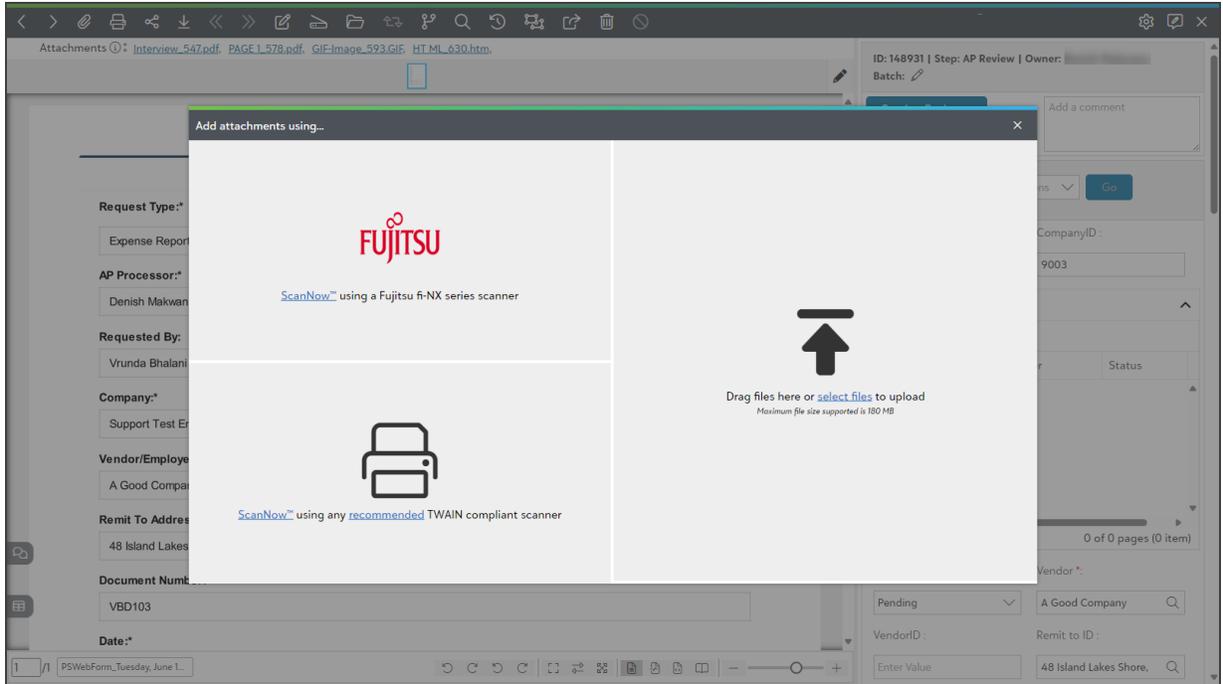
- Request Type:\*** Expense Report
- AP Processor:\*** [Redacted]
- Requested By:\*** [Redacted]
- Company:\*** Support Test Environment 1
- Vendor/Employee:\*** A Good Company
- Remit To Address:\*** 48 Island Lakes Shore,
- Document Number:\*** VBD103
- Date:\*** [Redacted]

The right-hand sidebar contains the following elements:

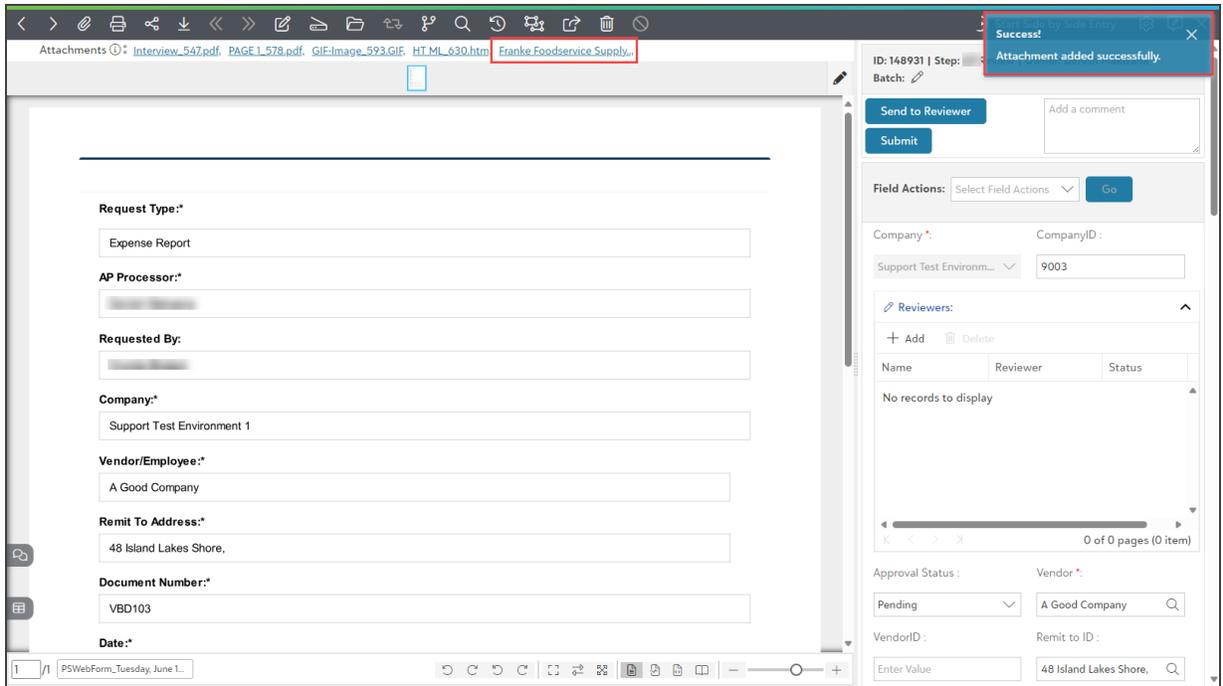
- Header: ID: 148931 | Step: AP Review | Owner: [Redacted]
- Batch: [Redacted]
- Buttons: Send to Reviewer, Add a comment, Submit
- Field Actions: Select Field Actions, Go
- Company:\*, CompanyID: [Redacted]
- Support Test Environ... [Redacted]
- Reviewers: + Add, Delete
- Table with columns: Name, Reviewer, Status. Content: No records to display.
- Approval Status: Pending, Vendor:\*, A Good Company
- VendorID: [Redacted], Remit to ID: 48 Island Lakes Shore,

The browser's address bar shows: Attachments | Interview\_547.pdf, PAGE\_1\_578.pdf, GIF:Image\_523.GIF, HT\_ML\_630.htm. The bottom status bar shows: 1 / 1 PSWebForm\_Tuesday, June 1...

3) A file capture option dialog box appears on the screen allowing you to add the attachment via TWAIN/Fujitsu Scanner or drag and drop/upload files from File Explorer.



4) When your attachment is added successfully, a success toast notification appears on the top-right corner of the screen and the attachment appears within the Attachments section as shown below. If it fails, a failure toast notification appears.



## Viewing the Attachments

1) Open the submitted Smartform item in the Workflow item viewer. Here, if there are any existing attachments then the Attachments section appears as shown below.

The screenshot displays a web-based Smartform interface. The main form area contains several fields with labels and values:

- Request Type:** Check Request
- AP Processor:** [Redacted]
- Requested By:** [Redacted]
- Company:** Support Test Environment 1
- Vendor/Employee:** \*GREENMAKER LLC\*
- Remit To Address:** \*GREENMAKER LLC\*
- Document Number:** VBD101

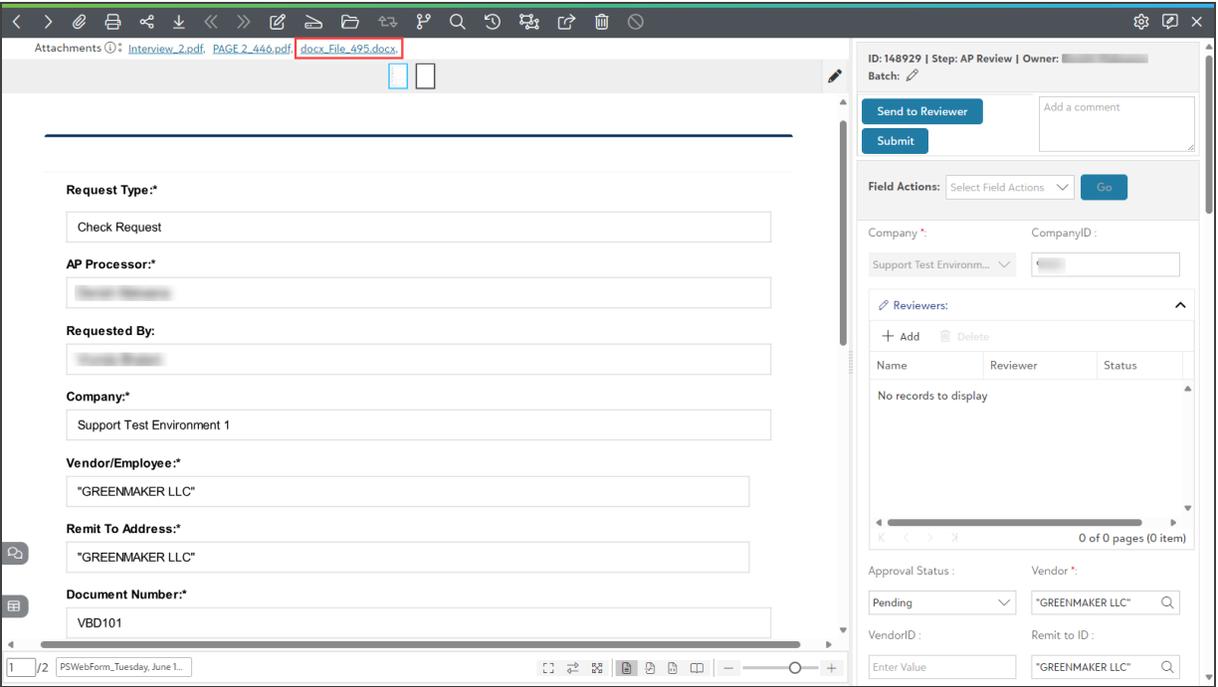
The right sidebar contains the following elements:

- Metadata: ID: 148929 | Step: AP Review | Owner: [Redacted]
- Batch: [Redacted]
- Buttons: Send to Reviewer, Submit, Add a comment
- Field Actions: Select Field Actions, Go
- Company: Company ID: [Redacted]
- Reviewers: A table with columns Name, Reviewer, and Status. It shows "No records to display".
- Approval Status: Pending
- Vendor: \*GREENMAKER LLC\*
- VendorID: [Redacted]
- Remit to ID: \*GREENMAKER LLC\*

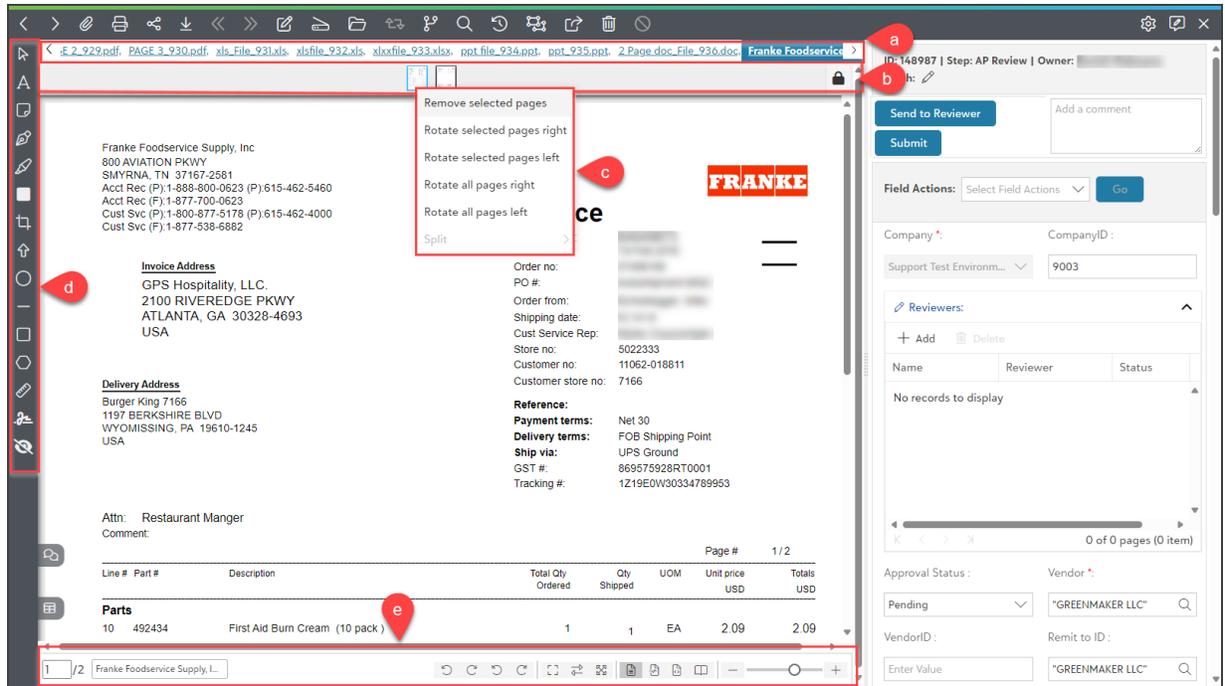
**Note:** In this toolbar, only the following options remain enabled in the Workflow item viewer when you open the Smartform item:

- a. *Item navigation options (previous/next arrow):* It allows you to navigate to the previous or next item in the Workflow item list.
- b. *Add Attachment:* It allows you to add new attachments to the Smartform. Click here to learn more about it.
- c. *Print:* It allows you to print the currently opened Smartform/attachment.
- d. *Share:* It allows you to share the Smartform item along with attachments by emailing the file/link, or using a copy link.
- e. *Download:* It allows you to download the currently opened Smart form.

2) Now, click on the desired attachments to view its content within the display area as shown below.



3) The opened attachment gets highlighted as shown in the "a" point in the below image. Here, you can perform various operations on attachment using the options available within the below-highlighted sections.



**a) Attachments section:** Within this section, on right-clicking the Attachment file name, you can view the Rename and Delete option in the menu. You can return to Smartform by clicking on the back arrow available before the Attachments' title. At the right end of the section, there are up-down arrows which enable when there are multiple attachments and need to move to a new line.

**Tip:** Refer to this [page](#) to learn more about Rename and Delete option

**b) Thumbnail panel:** In this panel, the thumbnail size images gets displayed.



**c) Context Menu:** On enabling the content to edit mode by clicking on the pencil icon in thumbnail panel, when you right-click on the thumbnail it displays the following options:

*i) Remove selected pages:* This option permanently removes the selected thumbnail page(s) from the thumbnail panel. On successful deletion of page, it displays success toast notification on top-right corner of screen.

*ii) Rotate selected pages right:* This option turns the selected thumbnail page by 90° in the clockwise direction.

*iii) Rotate selected pages left:* This option turns the selected thumbnail page by 90° in the anti-clockwise direction.

*iv) Rotate all pages right:* This option turns all the thumbnail page(s) by 90° in the clockwise direction.

*v) Rotate all pages left:* This option turns all the thumbnail page(s) by 90° in the anti-clockwise direction.

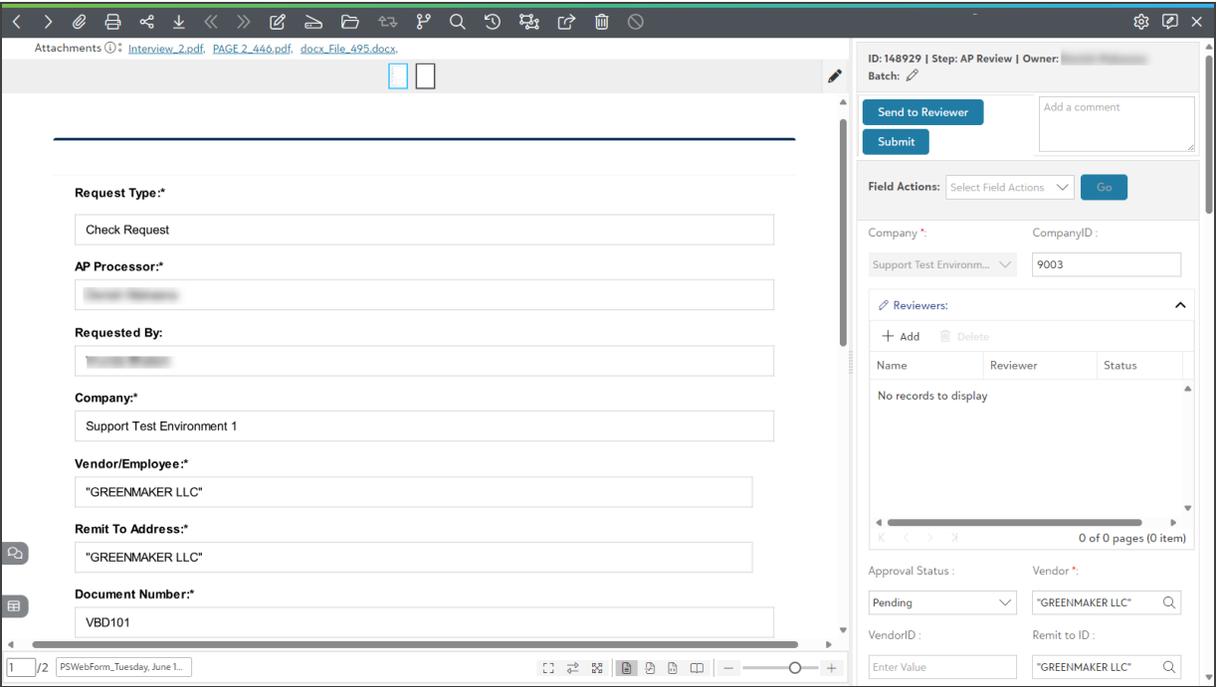
*vi) Split:* This option remains disabled for the Smartform item.

**d) Image page annotation options:** The image page annotation option allows you to apply annotations to the attachment. These annotation options do not appear for Microsoft Office files. Refer to [this](#) page to learn about all the annotations.

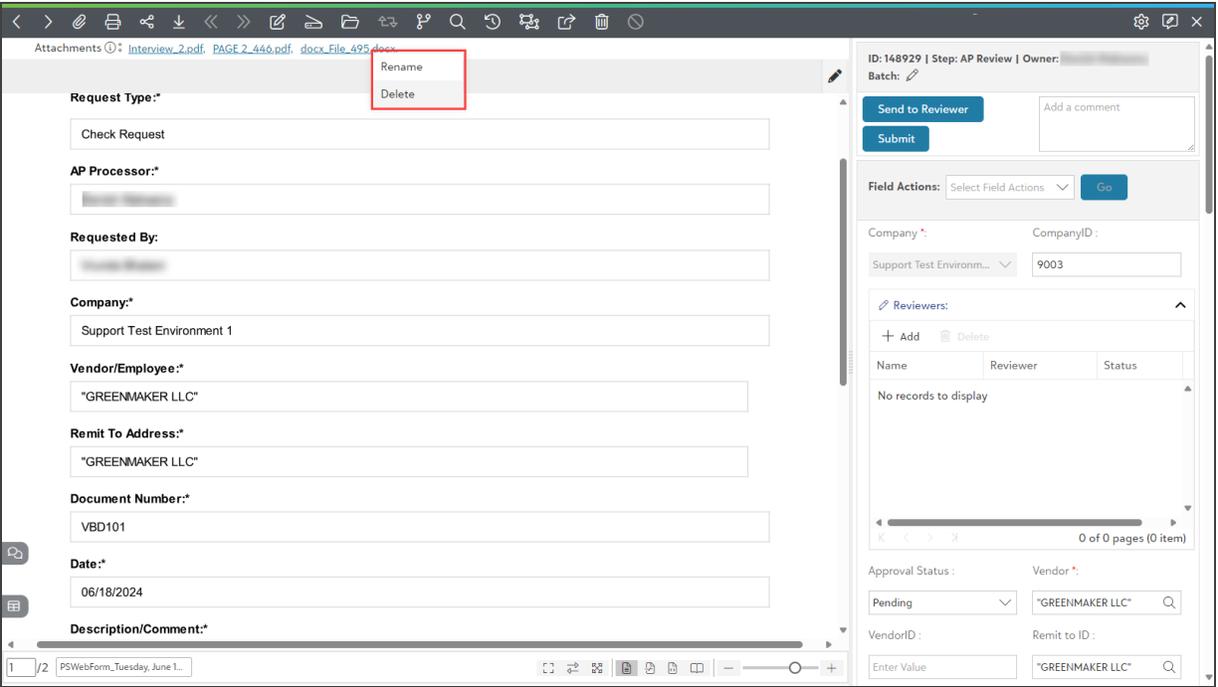
**e) Content Display options:** The status bar in the Workflow item viewer allows you to control your preference around document display. Refer to [this](#) page to know more about it.

## Renaming/Deleting the Attachments

1) Open the submitted Smartform item in the Workflow item viewer. Here, if there are any existing attachments then the Attachments section appears as shown below.



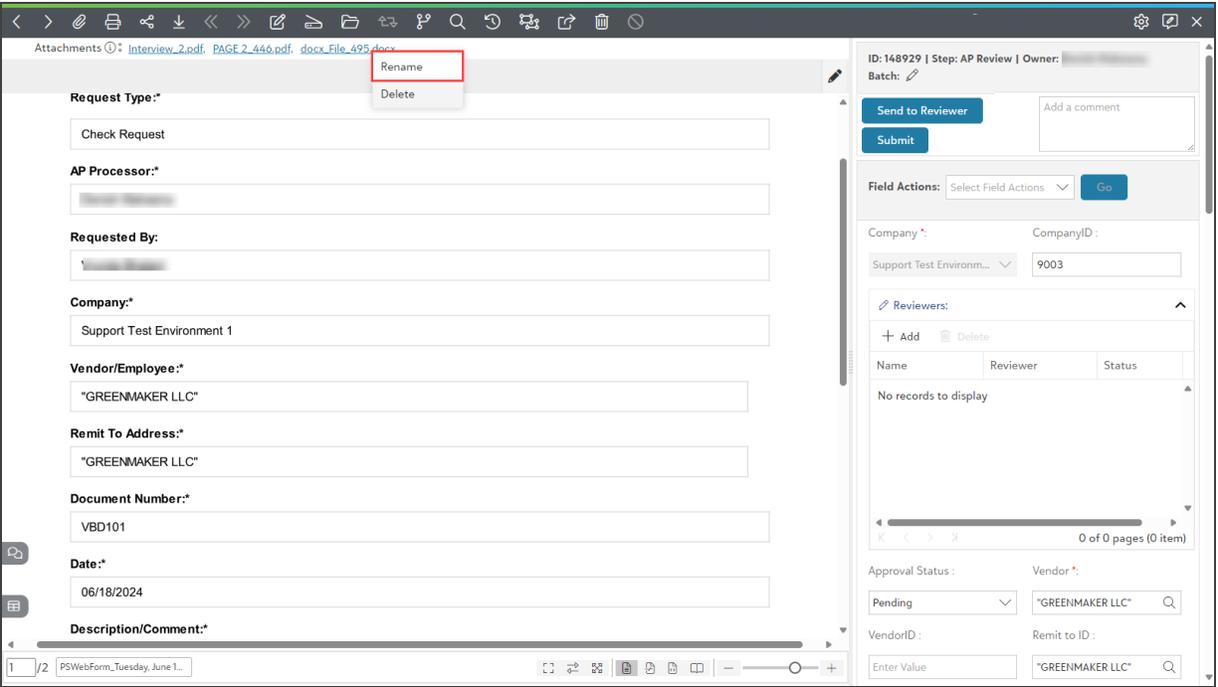
2) Right-click on the desired attachment in the Attachments section to view the menu with the **Rename** and **Delete** options as shown below.



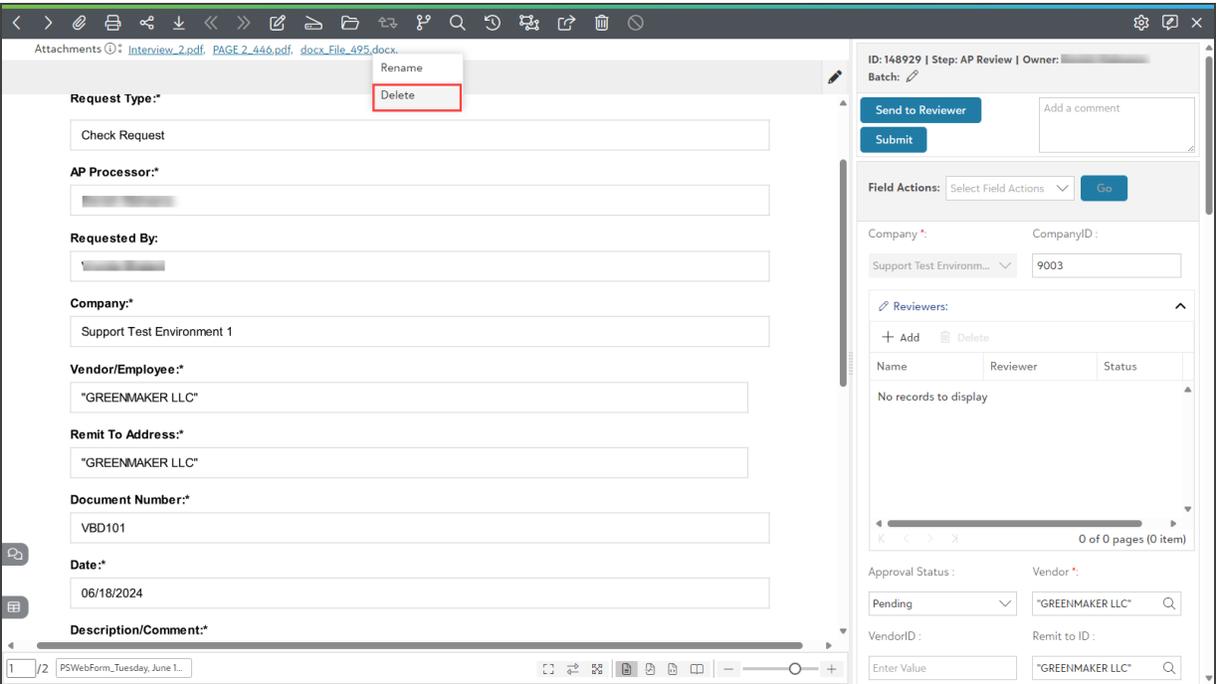
3) Now, click on the desired option from the menu.

a) When you select “**Rename**” option, it allows you to update the name of the Attachment.

**Note:** Currently, the Rename option is under implementation. Hence on clicking Rename option, “Coming Soon” message dialog box appears on the screen.



b) When you select "Delete" option, the confirmation dialog box appears on the screen.



## Delete attachment

The docx\_File\_495.docx will be deleted from the smartform permanently. Do you still want to delete it?

Yes

No

- On clicking **Yes**, the attachment gets deleted, and a success toast notification appears on the top-right corner of the screen as shown below.

The screenshot displays a web application interface with a form on the left and a right-hand panel. The form contains the following fields:

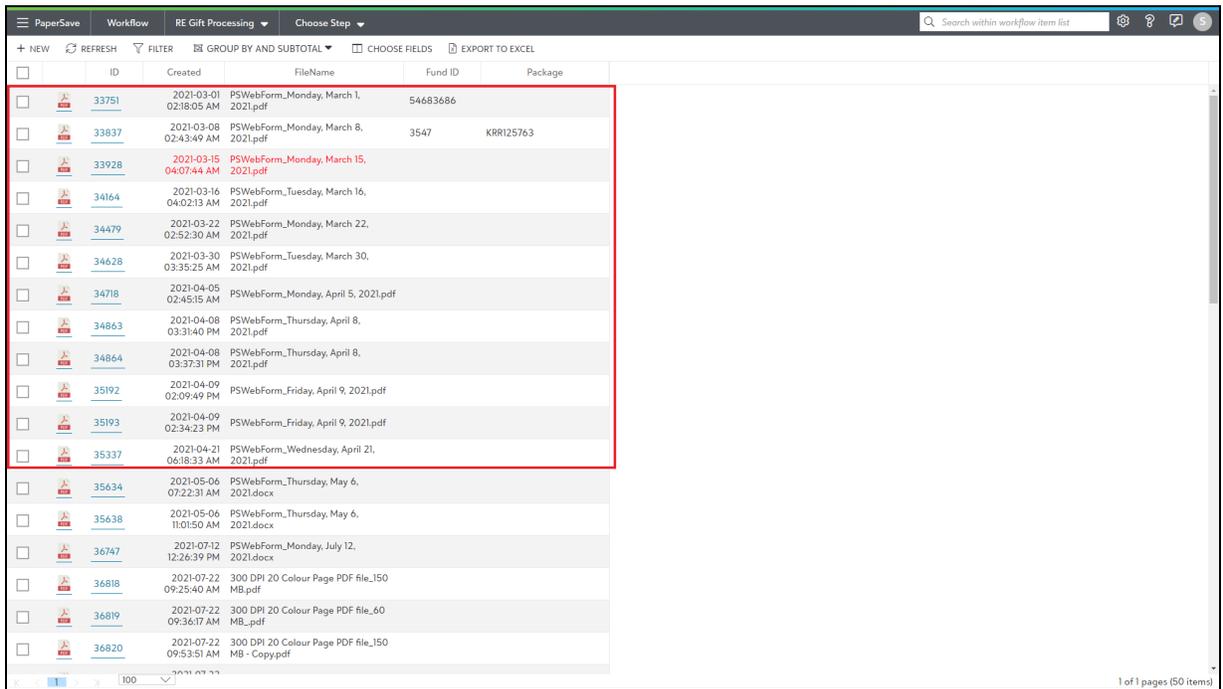
- Request Type:** Check Request
- AP Processor:** [Redacted]
- Requested By:** [Redacted]
- Company:** Support Test Environment 1
- Vendor/Employee:** \*GREENMAKER LLC\*
- Remit To Address:** \*GREENMAKER LLC\*
- Document Number:** VBD101
- Date:** 06/18/2024
- Description/Comment:** [Empty text area]

The right-hand panel includes a **Success!** toast notification at the top right, stating "Attachment deleted successfully." Below this, there are buttons for "Send to Reviewer" and "Submit", along with a "Field Actions" dropdown menu. The panel also features a "Reviewers" table with columns for Name, Reviewer, and Status, which currently shows "No records to display". At the bottom of the panel, there are search and filter options for "Approval Status" (set to Pending), "Vendor" (set to \*GREENMAKER LLC\*), "VendorID", and "Remit to ID".

## Modifying the Smart form values

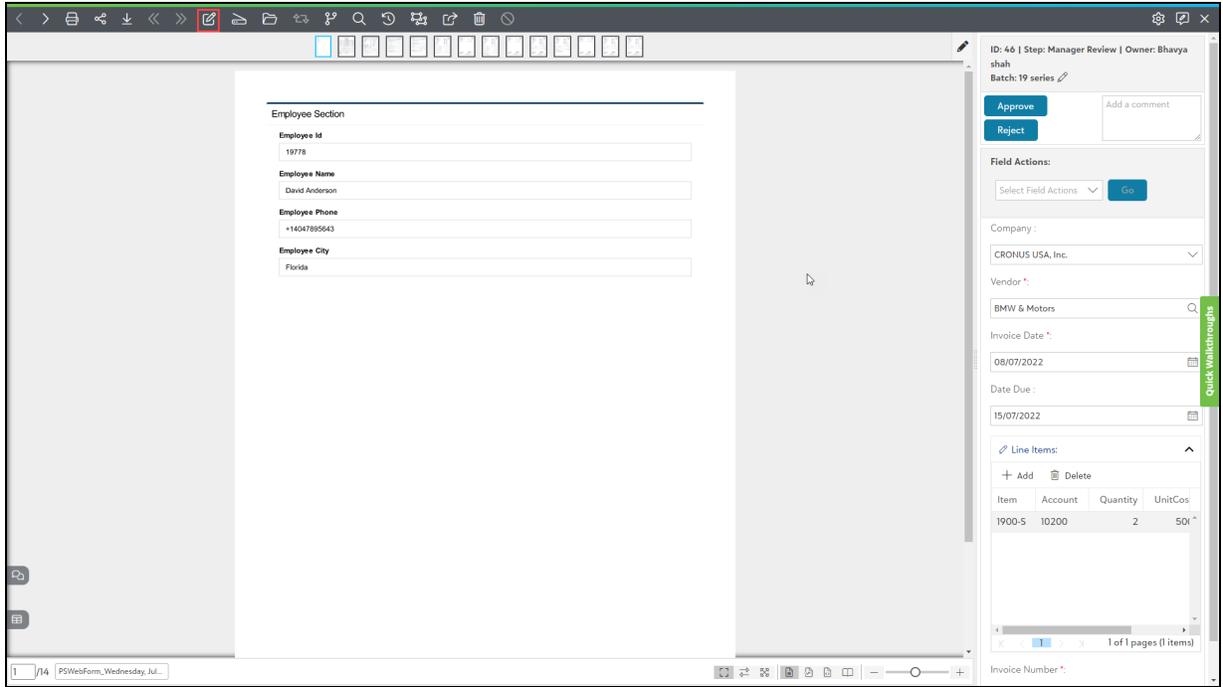
You can modify the smart form values after submitting it to the Workflow. Follow the below steps to update the smart form's value from the Workflow item viewer.

1) **Navigate** to the Workflow Area and **choose** the desired Workflow which contains Workflow items submitted via Smart form(s). A list of Workflow items submitted via smart form appears, as shown in the below screen.

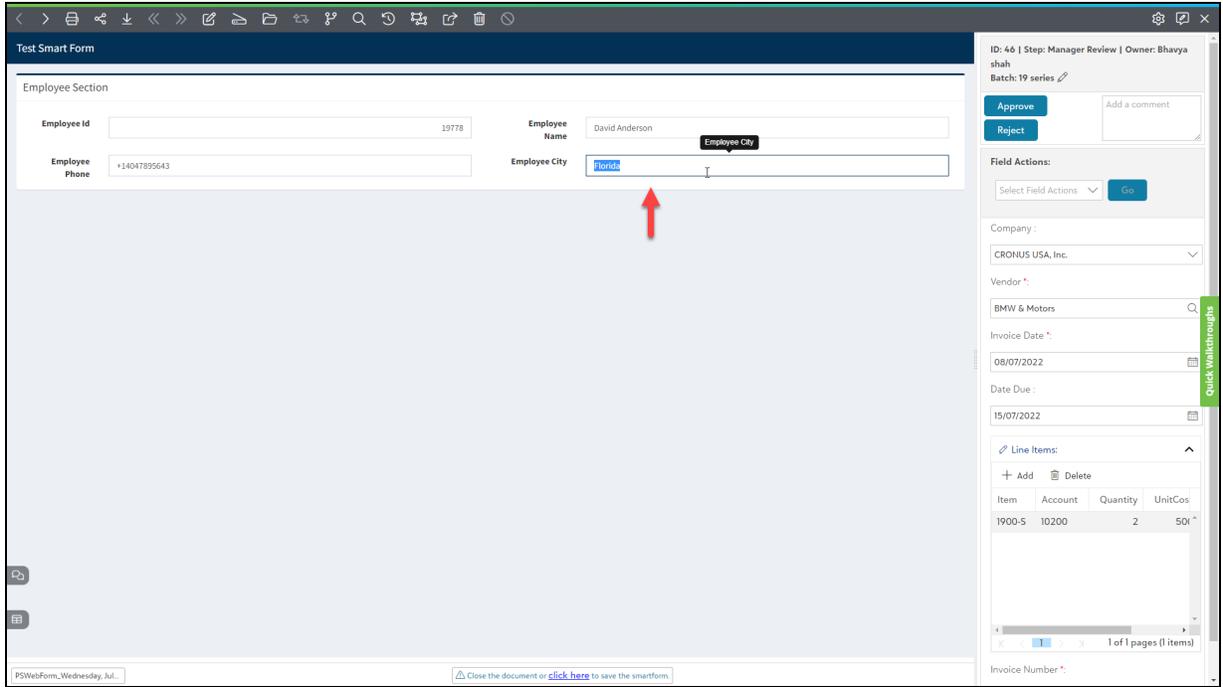


ID	Created	FileName	Fund ID	Package
33751	2021-03-01 02:18:05 AM	PSWebForm_Monday, March 1, 2021.pdf	54683686	
33837	2021-03-08 02:43:49 AM	PSWebForm_Monday, March 8, 2021.pdf	3547	KRR125763
33928	2021-03-15 04:07:44 AM	PSWebForm_Monday, March 15, 2021.pdf		
34164	2021-03-16 04:02:13 AM	PSWebForm_Tuesday, March 16, 2021.pdf		
34479	2021-03-22 02:52:30 AM	PSWebForm_Monday, March 22, 2021.pdf		
34628	2021-03-30 03:35:25 AM	PSWebForm_Tuesday, March 30, 2021.pdf		
34718	2021-04-05 02:45:15 AM	PSWebForm_Monday, April 5, 2021.pdf		
34863	2021-04-08 03:31:40 PM	PSWebForm_Thursday, April 8, 2021.pdf		
34864	2021-04-08 03:37:31 PM	PSWebForm_Thursday, April 8, 2021.pdf		
35192	2021-04-09 02:09:49 PM	PSWebForm_Friday, April 9, 2021.pdf		
35193	2021-04-09 02:34:23 PM	PSWebForm_Friday, April 9, 2021.pdf		
35337	2021-04-21 06:18:33 AM	PSWebForm_Wednesday, April 21, 2021.pdf		
35634	2021-05-06 07:22:31 AM	PSWebForm_Thursday, May 6, 2021.docx		
35638	2021-05-06 11:01:50 AM	PSWebForm_Thursday, May 6, 2021.docx		
36747	2021-07-12 12:26:39 PM	PSWebForm_Monday, July 12, 2021.docx		
36818	2021-07-22 09:25:40 AM	300 DPI 20 Colour Page PDF file_150 MB.pdf		
36819	2021-07-22 09:36:17 AM	300 DPI 20 Colour Page PDF file_60 MB_.pdf		
36820	2021-07-22 09:53:51 AM	300 DPI 20 Colour Page PDF file_150 MB - Copy.pdf		

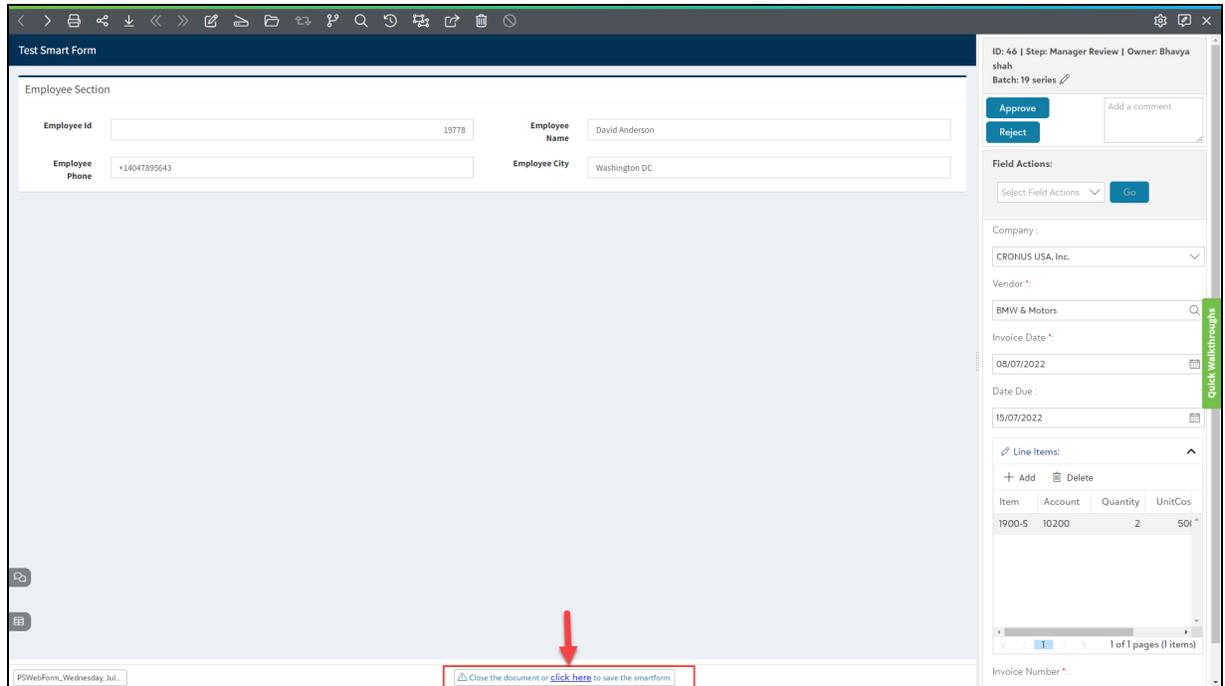
2) Once you open the item, click on Edit Form button from the top level toolbar.



3) On clicking Edit form button, PaperSave 6x login page appears. Enter your 6x credentials and smart form opens in an edit mode as shown below.

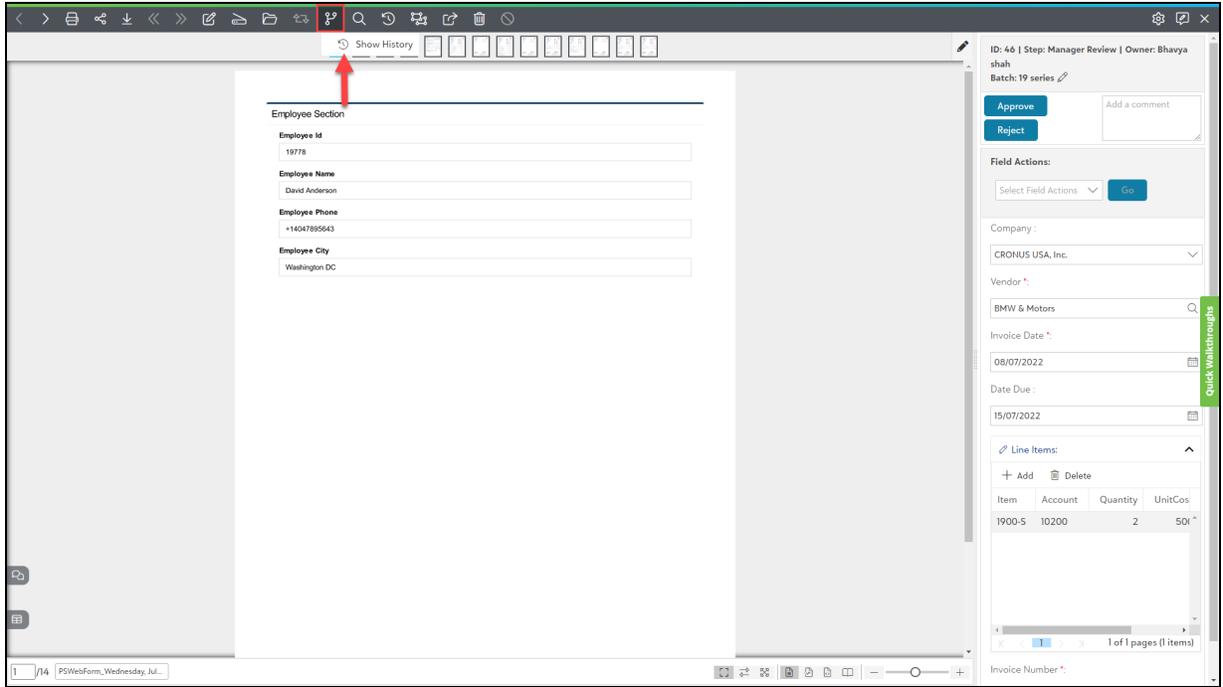


4) Now, make the changes and click on "click here" in status bar as shown below or close the document to save the smartform changes.

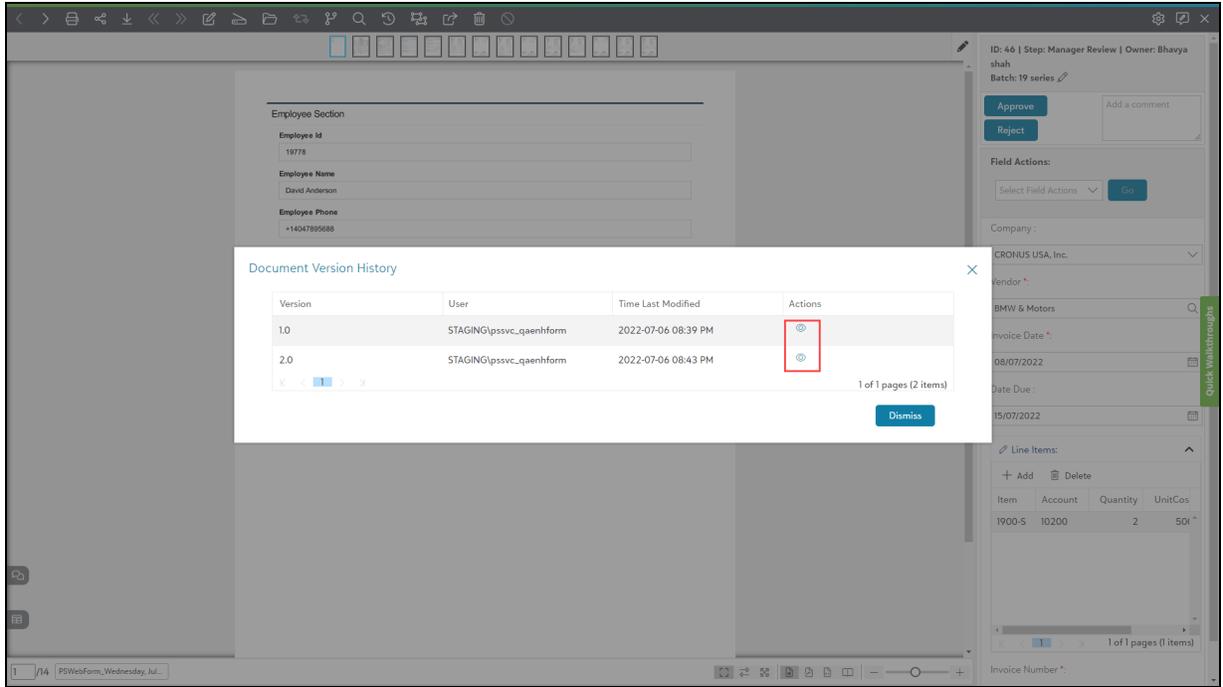


5) Once you save the changes, you return back to PaperSave 7x. Here, you can view all the changes made till now from the Version History option.

**Note:** For Smartform, only Show History option is available under Version Control which refrains you from restoring the previous changes.



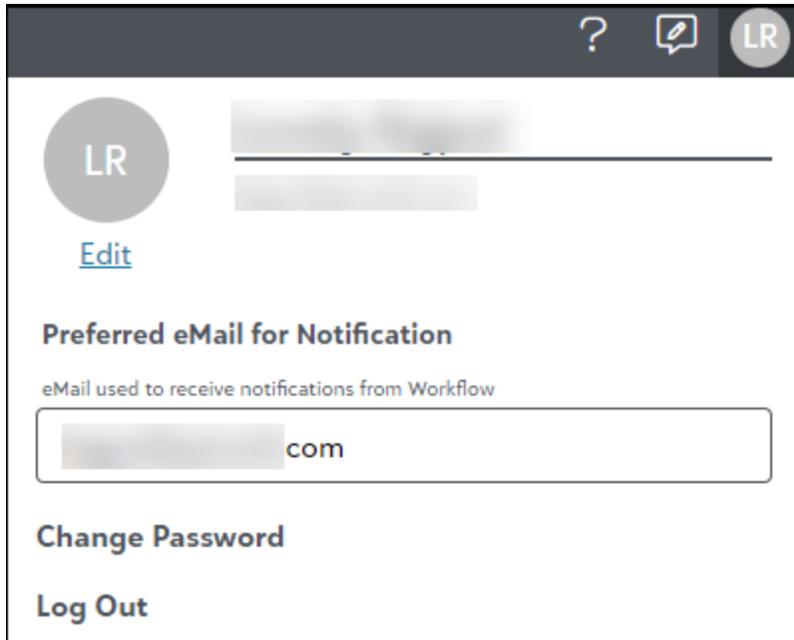
6) Now, when you click on **Show History** option and Document version history dialog box appears as shown below where you can view the previous changes by clicking on an eye icon under Actions.



## User Profile



Click on the  option from the top right corner in the Application toolbar to edit the current user details such as profile picture and preferred Email for Notification, Change Password, and Log Out, as shown in below screen.



Watch the [video](#) to learn the options in the User Profile.

Below is the description of various options in the User Profile:

### 1) Avatar/Profile picture

This option enables you to change the Profile picture of the current user. Click on the "**Edit**" given below the Picture to choose another picture.



**Note:** It displays the current user's initials by default if the user has not yet uploaded the profile picture.

## 2) Preferred Email notification

This option can be used to configure the email address to receive the Workflow related notification(s).

**Warning:** If an invalid email address is entered, then it will show a red colored outline with message “**Invalid email address format**” below the textbox.

## 3) Change Password

To change the password:

- 1) Click **Change Password**.
- 2) Change Password screen appears from where you can change the password.
- 3) Enter the old password, and the new password, and confirm the new password in the respective fields.

### **Note:**

Your password should contain the following:

- I. Password should be at least 6 characters long.
- II. Password should satisfy at least three of following:
  - a) Should have a lowercase.
  - b) Should have an upper case.
  - c) Should have numeric value(s).
  - d) Should have special character(s).

- 4) Click on the **Change Password** button to change the password.



Please consider changing your password for  
PaperSave

User Name

Password

New Password

Confirm New Password

Change Password

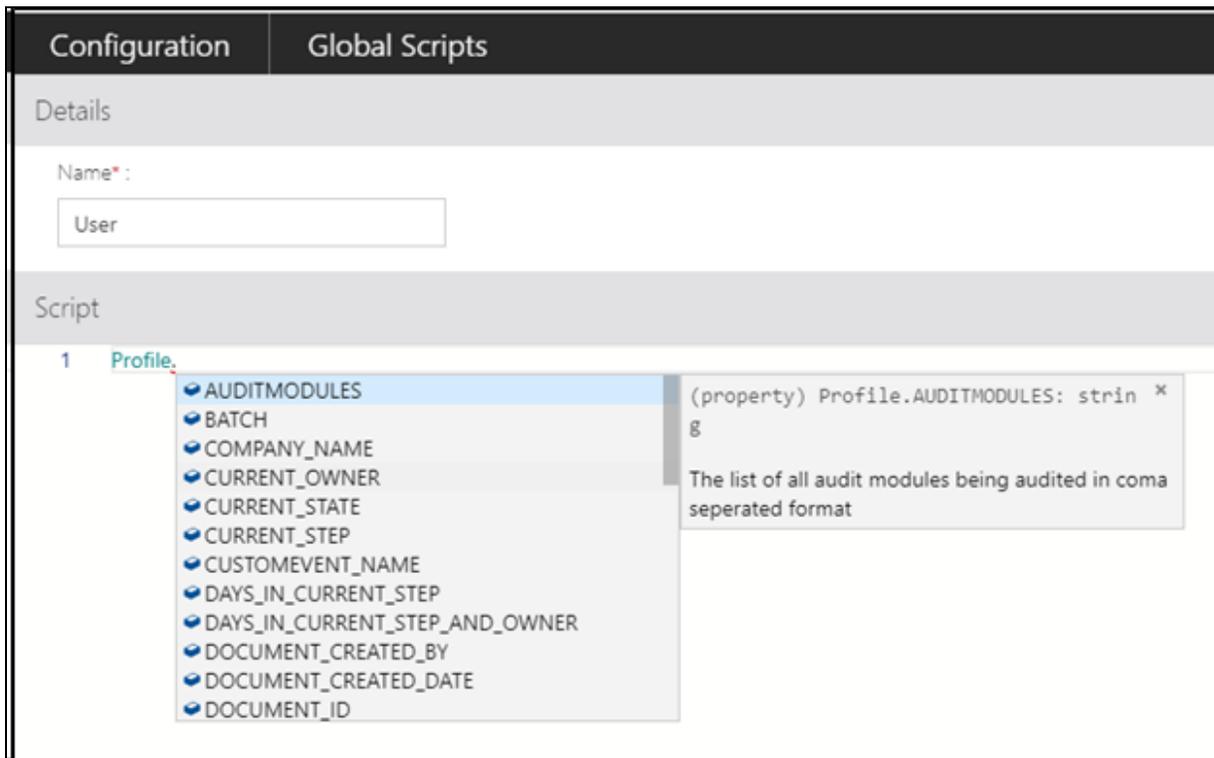
#### 4) Log Out

Click on this option to logout of the current PaperSave App.

**Note:** If the multiple PaperSave windows are open simultaneously and you opt to log out of either of the windows, then you shall be redirected to PaperSave's login prompt in all the windows.

## Intellisense variables for Global scripts

PaperSave Intellisense enhances the user experience in writing the scripts in Global script editor window. As you write the class name (such as profile, parameter, PaperSave, Globals, etc.) followed by dot(.), then a list of related functions/methods available for the respective class will be suggested. Also, you can view the prompt help in the tooltip on hovering the cursor over the respective functions/methods as displayed in the below screen:



The following are the different PaperSave variables that can be used while writing Global script in the script editor window:

Global Script Variable Name	Description
Profile.AUDITMODULES	It fetches a list of all modules being audited in comma separated format.

Profile.BATCH	It fetches the batch name of the current Workflow item.
Profile.COMPANY_NAME	It fetches the Integrated app instance of the current document.
Profile.CURRENT_OWNER	It fetches the owner of the current Workflow item in DOMAIN\USERNAME format.
Profile.CURRENT_STATE	It fetches the current state of the Workflow item.
Profile.CUSTOMEVENT_NAME	It fetches the customevent branch name to be used in the pre-script only.
Profile.DAYS_IN_CURRENT_STEP	It fetches the number of days the Workflow Item is in the Current Step.
Profile.DAYS_IN_CURRENT_STEP_AND_OWNER	It fetches the number of days the Workflow Item is in the Current Step or with the Current Owner.
Profile.DOCUMENT_CREATED_BY	It fetches the user who created current document (specific to Workflow Forms).
Profile.DOCUMENT_CREATED_DATE	It fetches the current document's creation date.
Profile.DOCUMENT_ID	It fetches the identification number for the current document.
Profile.DOCUMENT_TYPE	It fetches the document type for the current document.
Profile.DROPPPOINT_ID	It fetches the Drop point ID for current Workflow item.
Profile.DROPPPOINT_NAME	It fetches the Drop point name for the current Workflow item.
Profile.FROMEMAIL	It fetches the FROM EMAIL configured for SMTP.
Profile.HAS_BEEN_ASSOCIATED	It fetches the result whether current workflow item has been associated to an integrated app record. (case sensitive)
Profile.HOSTAPPLICATION	It fetches the Integrated application name of the current document.
Profile.IS_ASSOCIATED	It fetches the result whether the current workflow item is associated to an integrated app record. (case insensitive).
Profile.MIME_TYPE	It fetches the multipurpose internet mail extensions format of the current document.
Profile.MODULE	It fetches the Module of the current document.
Profile.PAPERSAVE_CONNECTION_STRING	It fetches the PaperSave Connection String for database.
Profile.PARENTID	It fetches the Parent host record identification key for the associated

	document.
Profile.QUEUEITEM_FILENAME	It fetches the file name of the current Workflow item.
Profile.QUEUEITEM_ID	It fetches the identification number of current Workflow item.
Profile.TRANSACTION_TYPE	It fetches the transaction type of the current document.
Profile.USER	It fetches the current user's username.
Profile.USERS_GROUP	It fetches the User Group for the current user.
Profile.WORKFLOWITEM_FILENAME	It fetches the file name of the current Workflow item.
Profile.WORKFLOWITEM_ID	It fetches the identification number of the current Workflow item.
Profile.WORKFLOW_ID	It fetches the identification number of the Workflow for current Workflow item.
Profile.WORKFLOW_NAME	It fetches the name of the workflow for the current document.
Profile.FieldName.Redact	It redacts the entered Workflow Field in the current Workflow item.
PaperSave.Blackbaud	It invokes Blackbaud API methods.
PaperSave.BlackbaudSky	It invokes Blackbaud API methods.
PaperSave.CancelScript	It cancels the event from being sent to the server during a Pre-Event Script (PreScript) being executed on an event.
PaperSave.Context	It fetches the result whether the current script is being executed within Web or Windows.
PaperSave.Dynamics365	It invokes Dynamics 365 WebAPI methods.
PaperSave.DynamicsCRM	It invokes Dynamics CRM WebAPI methods.
PaperSave.ExecuteSQLServerQuery	It executes a SQL statement against a database. If the statement is a select statement, then it will return the resultset of statement as a Javascript Array that can be accessed using the following syntax to return a single column value for a specific row.  <a href="#">ResultVariable[RowIndex].ColumnName</a>
PaperSave.GetListOfUsersInAGroup	It fetches the list of users in a group from the PaperSave Application Server's domain (On-Premise) or in a group of users set up within PaperSaveCloud. The resultset of users is returned as a Javascript array.

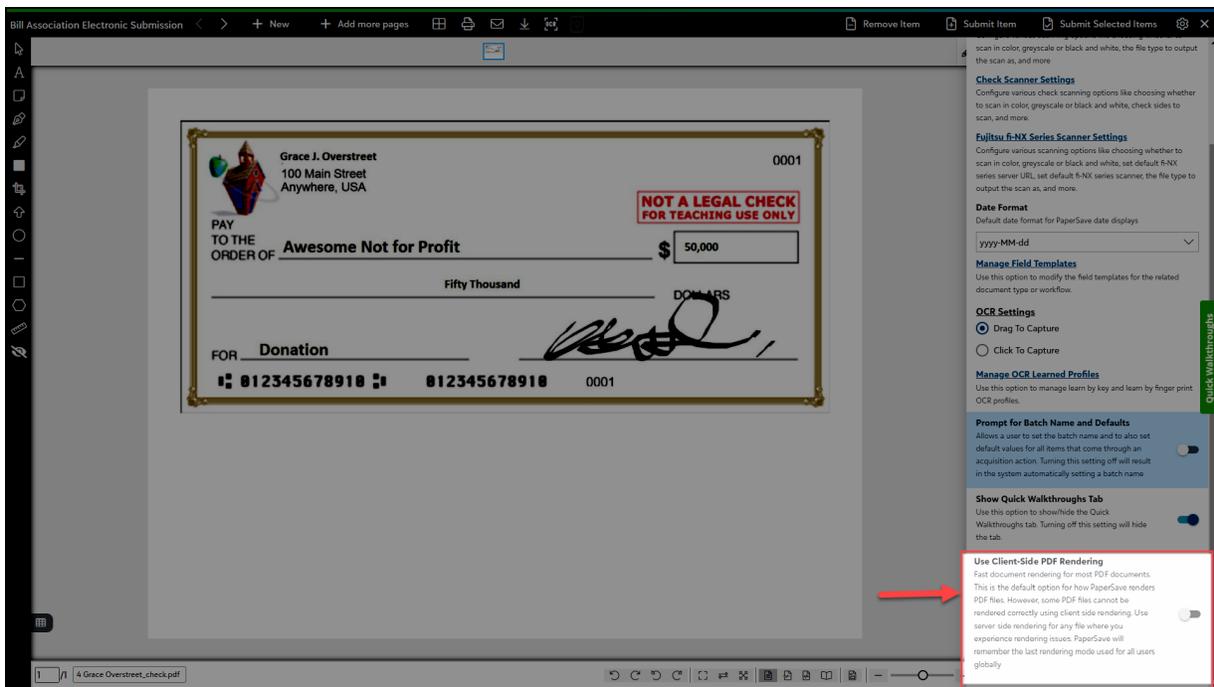
PaperSave.IncludeScript	It includes a desired script from the existing list of Global scripts.
PaperSave.Intacct	It invokes Intacct WebAPI methods.
PaperSave.IsWeb	It detects whether the script is being executed from within a web client. Returns true or false.
PaperSave.IsWindows	It detects whether the script is being executed from within a windows client. Returns true or false.
PaperSave.RedactDocument	It detects whether document for given page number is available or not. Returns true or false.
PaperSave.ShowMessage	It shows a message to the user.
PaperSave.User	It fetches the values of the current user such as Display name, login name, email, tags, and groups.
PaperSave.getVal	It fetches the value of Global variables by name.
PaperSave.BlackbaudSky.CallSkyAPI	It fetches the records from Blackbaud using SKY API.
PaperSave.Blackbaud.GetRecords	It fetches the records from Blackbaud.
Globals.getval	It sets the value of a Globals variable by name or adds a new Variable to the Globals variable collection.
Globals.add	It sets the value of a Globals variable by name or adds a new Variable to the Globals variable collection.
Parameter.<Workflow_Parameter_Name>	It includes any of the existing Workflow Parameter in the global script.

## Client-Side Rendering

PaperSave now provides the "Use Client-Side PDF Rendering" option within the item viewer's settings panel which on enabling helps to load the PDF document faster than the Server-side rendering.

**Note:** The "Use Client-Side PDF Rendering" option is only supported for PDF MIME-type documents. Hence, this settings option appears only when you acquire/open the PDF document in an item viewer.

This option remains enabled if the PDF document size is under the defined threshold limit and automatically gets disabled when the document size crosses the threshold. However, once you change this settings option (i.e., enable/disable the option) for the particular acquired/opened PDF document, your changes automatically get remembered for it, irrespective to the size of that document.



To change the rendering size limit, you can contact your PaperSave's System Admin user and update the config value of "*MaxDocSizeForPDFClientSideRenderingInMB*" configuration from the **Miscellaneous Settings** in the Configuration Area.

**Note:** The default Client-side rendering size limit is defined as 150 MB.

When the Client-side rendering option is enabled:

- 1) The document starts rendering at the client's side.
- 2) Although the document renders quicker than the Server-side rendering, there is a possibility of distortion.
- 3) The "image/SVG rendering" option disappears from the Content display option.

**Note:** The "image/SVG rendering" option will appear only when the file is "PDF" and Client-side rendering option is disabled.



The following are the primary benefits of this option:

- You can easily set the rendering on the Client or Server-side because this settings option is user-specific.
- Certain distorted PDF documents will now display properly.
- The text search within the document becomes easy to search.

## Supported File Formats

PaperSave supports the following file formats for adding documents. Any file which has extension other than the following extensions

.tif", ".tiff", ".doc", ".docx", ".xls", ".xlsx", ".ppt", ".pptx", ".html", ".htm", ".jpg", ".jpeg", ".bmp", ".pdf", ".gif" will not be having any viewer for such files, but PaperSave will just show the link of the file in the PaperSave Document

viewer. When you will click on the link it will open the file with the default program associated for that extension in Windows.

## Limitation

PaperSave does not support printing files which have an extension other than the following extensions

- .tif
- .tiff
- .doc
- .docx
- .xls
- .xlsx
- .ppt
- .pptx
- .html
- .htm
- .jpg
- .jpeg
- .bmp
- .pdf
- .gif

**Warning:** Print option will be disabled for any other file formats.

## Unsupported File Formats

Following are the file formats that are not supported by PaperSave for adding documents.

.ade	.idq	.msi
.adp	.ins	.msp
.app	.isp	.mst
.asa	.its	.ops
.ashx	.jse	.pcd
.asmx	.ksh	.pif
.asp	.lnk	.prf
.bas	.mad	.prg
.bat	.maf	.printer
.cdx	.mag	.pst
.cer	.mar	.reg
.chm	.mas	.rem
.class	.mat	.scf
.cmd	.mau	.scr
.com	.mav	.sct
.config	.maw	.shb
.cpl	.mda	.shs
.crt	.mdb	.shtm
.csh	.mde	.shtml
.dll	.mdt	.soap
.exe	.mdw	.url
.fxp	.mdz	.vb
.hlp	.msc	.vbs
.hta	.msh	.ws
.htr	.msh1	.wsc

.htw	.mshxml	.wsf
.ida	.msh2	.wsh
.idc	.msh2xml	.tlb

## PaperSave supported Record Types for Blackbaud CRM

The following table displays the list of supported Blackbaud Record types.

Modules	Record types	Parent ID field
Records	Appeal Mail List	Appeal Mail List ID
Records	Committee	Committee ID
Records	Constituent	Constituent ID
Records	Event	Event ID
Records	Funding Plan	Funding Plan ID
Records	Funding Request	Funding Request ID
Records	Grant Program	Grant Program ID
Records	Membership	Membership ID
Records	Planned Giving	Planned Giving ID
Records	Prospect Plan	Prospect Plan ID
Records	Purpose	Purpose ID
Records	Stewardship Plan	Stewardship Plan ID
Transactions	Interaction	Interaction ID
Transactions	Membership Installment Plan	
Transactions	Naming Opportunity	Naming Opportunity ID
Transactions	Opportunity	Opportunity ID
Transactions	Revenue	Revenue ID

**Note:** In the first phase, Data Sync and Interrelationship functionalities are not supported for "Funding Plan", "Funding Request", "Grant Program", and "Stewardship Plan" record types from the above list.

## Supported Interrelationship Record Types

The following table shows the lists of supported interrelationships between the different Record Types:

Transaction Type (Parent)	Transaction Type (Parent)
Constituent	Revenue
Constituent	Naming Opportunity
Constituent	Planned Giving
Constituent	Prospect Plan
Constituent	Interaction
Purpose	Naming Opportunity
Purpose	Revenue
Naming Opportunity	Constituent
Naming Opportunity	Revenue
Naming Opportunity	Purpose
Revenue	Purpose
Revenue	Constituent
Revenue	Naming Opportunity
Prospect Plan	Constituent
Planned Giving	Constituent
Interaction	Constituent
Interaction	Interaction

## Choose Fields

You can set your user preferences to manage what information is displayed in the list by adding or removing columns based on what's important to you using Choose Fields.

Watch the [video](#) to learn about the Choose Fields feature.

- Click on "**CHOOSE FIELDS**" option in the list toolbar as shown in the below screen.

+ NEW REFRESH FILTER GROUP BY AND SUBTOTAL CHOOSE FIELDS EXPORT TO EXCEL													
ID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount	Invoice		
18212	true	11/28/2017 06:46:15 AM	Initial	Vivek Soni	255	75548	true						
18213	true	11/28/2017 06:46:19 AM	Initial	Vivek Soni	255	75549	true						
305563	true	05/31/2019 04:25:20 AM	Keying	Vivek Soni	255	824601	true	A Travel Company		\$305,563.00	INV 1821		
305567	true	05/31/2019 05:57:56 AM	Keying	Vivek Soni	255	824605	true						
431536	true	03/19/2019 05:37:40 AM	Keying	Vivek Soni	255	559451	true			\$1,000.00	INV 0		
431537	true	08/06/2019 04:43:50 AM	Keying	Vivek Soni	255	1095722	true			\$200.00	INV 128		
431618	true	08/07/2019 06:11:04 AM	Keying	Vivek Soni	255	1095852	true	New World Company		\$10,000.00	859652		
441619	true	08/07/2019 06:05:39 AM	Keying	Vivek Soni	255	1095850	true	Denny Gunawan	08/02/2019	\$39.60	2013030		
441620	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020.00	00123		
441625	true	08/07/2019 04:21:18 AM	Keying	Vivek Soni	255	1095845	true						
441626	true	08/07/2019 05:56:34 AM	Keying	Vivek Soni	255	1095848	true				INV 0		
441627	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105868	true						

- As you click on "**CHOOSE FIELDS**" option, a dialog box will appear where you can select the desired fields to be displayed in the list.

+ NEW REFRESH FILTER GROUP BY AND SUBTOTAL CHOOSE FIELDS EXPORT TO EXCEL													
ID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount	Invoice		
18212	true	11/28/2017 06:46:15 AM	Initial	Vivek Soni	255	75548	true						
18213	true	11/28/2017 06:46:19 AM	Initial	Vivek Soni	255	75549	true						
305563	true	05/31/2019 04:25:20 AM	Keying	Vivek Soni	255	824601	true	A Travel Company		\$305,563.00	INV 1821		
305567	true	05/31/2019 05:57:56 AM	Keying	Vivek Soni	255	824605	true						
431536	true	03/19/2019 05:37:40 AM	Keying	Vivek Soni	255	559451	true			\$1,000.00	INV 0		
431537	true	08/06/2019 04:43:50 AM	Keying	Vivek Soni	255	1095722	true			\$200.00	INV 128		
431618	true	08/07/2019 06:11:04 AM	Keying	Vivek Soni	255	1095852	true	New World Company		\$10,000.00	859652		
441619	true	08/07/2019 06:05:39 AM	Keying	Vivek Soni	255	1095850	true	Denny Gunawan	08/02/2019	\$39.60	2013030		
441620	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020.00	00123		
441625	true	08/07/2019 04:21:18 AM	Keying	Vivek Soni	255	1095845	true						
441626	true	08/07/2019 05:56:34 AM	Keying	Vivek Soni	255	1095848	true				INV 0		
441627	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105868	true						

- As you uncheck certain fields from the "**Choose Fields**" dialog box and Click **OK**, the list will be displayed with the selected header fields only.

ID	Created	Step	Vendor
<a href="#">18212</a>	11/28/2017 06:46:15 AM	Initial	
<a href="#">18213</a>	11/28/2017 06:46:19 AM	Initial	
<a href="#">305563</a>	05/31/2019 04:25:20 AM	Keying	A Travel Company
<a href="#">305567</a>	05/31/2019 05:57:56 AM	Keying	
<a href="#">431536</a>	03/19/2019 05:37:40 AM	Keying	
<a href="#">431537</a>	08/06/2019 04:43:50 AM	Keying	
<a href="#">431618</a>	08/07/2019 06:11:04 AM	Keying	New World Company
<a href="#">441619</a>	08/07/2019 06:05:39 AM	Keying	Denny Gunawan
<a href="#">441620</a>	08/08/2019 06:07:26 AM	Keying	Workforce Development Pty Ltd
<a href="#">441625</a>	08/07/2019 04:21:18 AM	Keying	
<a href="#">441626</a>	08/07/2019 05:56:34 AM	Keying	

1 of 1 pages (18 items)

## Fields Selected "By default"

If you are accessing the "**Choose Fields**" option for the first time, then upon accessing "**Choose Fields**" option, It will load all the default fields (columns).

Similarly, If you have already chosen the fields to be displayed, then upon accessing "**Choose Fields**" option, It will load the fields (columns) which were chosen at last time, and remaining fields will appear as unchecked.

## Selecting the fields to be displayed

To view certain fields on the List, select the particular field using respective **check box** (Blue tick mark will appear on selecting the checkbox). Then, Click "**OK**" to save the changes.

**Tip:** If the field list is too long, **Scroll down** to view the remaining fields or **Type** in the desired field name **in the search box** to view the corresponding fields.

**Warning:** You cannot uncheck all the fields in the list.

## Cancel the changes made in "Choose Fields"

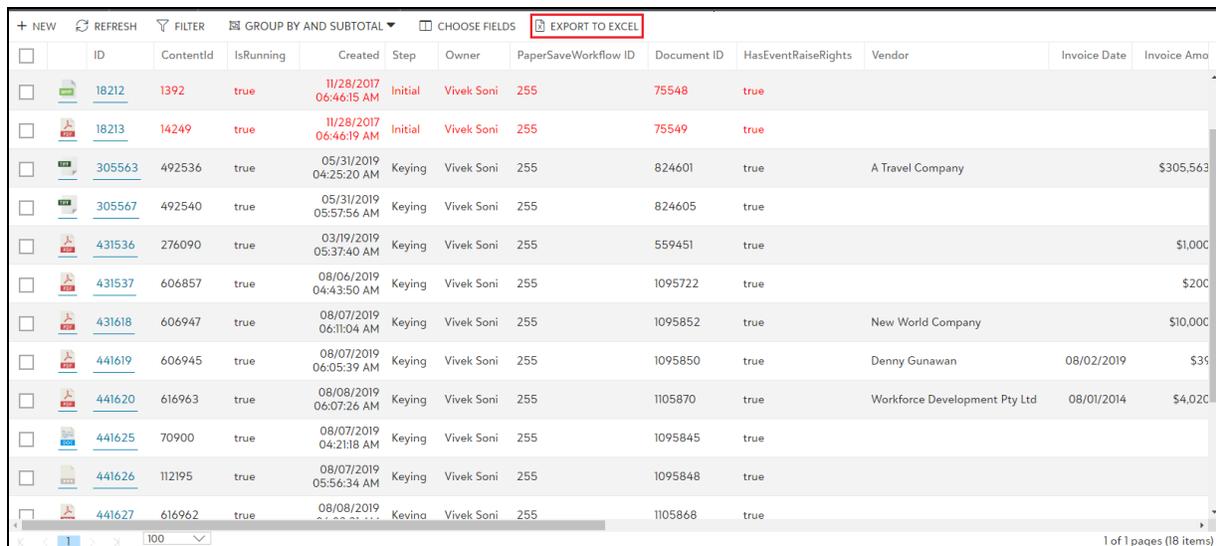
Click "X" or press "Esc" to exit the choose fields window without saving any changes.

## Export to Excel

This option allows you to export the items in the current list to an excel file.

**Note: Note:** This option creates an MS Excel file with links to the documents, which is useful when you want to share with users outside of the system in cases such as an audit.

Click on "Export to Excel" option from the list toolbar to export the items in the list to Excel File as shown below. An Excel file titled "PaperSave export.xlsx" will be auto-downloaded



The screenshot shows a web application interface with a list of items. The toolbar at the top includes buttons for NEW, REFRESH, FILTER, GROUP BY AND SUBTOTAL, CHOOSE FIELDS, and EXPORT TO EXCEL. The 'EXPORT TO EXCEL' button is highlighted with a red box. The list below contains columns for ID, ContentID, IsRunning, Created, Step, Owner, PaperSaveWorkflow ID, Document ID, HasEventRaiseRights, Vendor, Invoice Date, and Invoice Amount. The list is paginated to show 1 of 1 pages (18 items).

ID	ContentID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount
18212	1392	true	11/28/2017 06:46:15 AM	Initial	Vivek Soni	255	75548	true			
18213	14249	true	11/28/2017 06:46:19 AM	Initial	Vivek Soni	255	75549	true			
305563	492536	true	05/31/2019 04:25:20 AM	Keying	Vivek Soni	255	824601	true	A Travel Company		\$305,563
305567	492540	true	05/31/2019 05:57:56 AM	Keying	Vivek Soni	255	824605	true			
431536	276090	true	03/19/2019 05:37:40 AM	Keying	Vivek Soni	255	559451	true			\$1,000
431537	606857	true	08/06/2019 04:43:50 AM	Keying	Vivek Soni	255	1095722	true			\$200
431618	606947	true	08/07/2019 06:11:04 AM	Keying	Vivek Soni	255	1095852	true	New World Company		\$10,000
441619	606945	true	08/07/2019 06:05:39 AM	Keying	Vivek Soni	255	1095850	true	Denny Gunawan	08/02/2019	\$300
441620	616963	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020
441625	70900	true	08/07/2019 04:21:18 AM	Keying	Vivek Soni	255	1095845	true			
441626	112195	true	08/07/2019 05:56:34 AM	Keying	Vivek Soni	255	1095848	true			
441627	616962	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105868	true			

**Note:** In the exported Excel file, the fields that contain hyperlinks will be blank due to security reasons. It will be only visible in edit mode of Microsoft Excel.

**Tip:** Export to Excel option is available for different modules across PaperSave. Hence, the items in the list may vary but the basic functionality of exporting the items in that particular list to an Excel file remains the same.

**Note:** In PaperSave, when Export to Excel is clicked when no Workflow item is selected in the list then it will:

1. Start the download immediately if the total number of items are less than or equal to the current page size.
2. Send an email to the current user's email address with a link to download the Workflow items if the total number of Workflow items are more than the current page size. The email contains a link that allows you to download an Excel file containing all the exported Workflow items.

Currently, this functionality is only supported in the Workflow Area.

#### Export to Excel in process

We are preparing the selected item(s) for export to excel. Your files will be available shortly. Once ready an email containing a link to download the files will be sent to [amit.jain@papersoft.com](mailto:amit.jain@papersoft.com)

Dismiss

## Group by and Subtotal

This option allows you to cluster the items in the list based on the selected header columns and get the summation of the fields configured with the data type as number.

Watch the [video](#) to learn about the Group By and SubTotal feature.

- Click on "**GROUP BY AND SUBTOTAL**" from the list toolbar as shown in the below screen.

+ NEW REFRESH FILTER <b>GROUP BY AND SUBTOTAL</b> CHOOSE FIELDS EXPORT TO EXCEL													
ID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount	Invoice		
18212	true	11/28/2017 06:46:15 AM	Initial	Vivek Soni	255	75548	true						
18213	true	11/28/2017 06:46:19 AM	Initial	Vivek Soni	255	75549	true						
305563	true	05/31/2019 04:25:20 AM	Keying	Vivek Soni	255	824601	true	A Travel Company		\$305,563.00	INV 1821		
305567	true	05/31/2019 05:57:56 AM	Keying	Vivek Soni	255	824605	true						
431536	true	03/19/2019 05:37:40 AM	Keying	Vivek Soni	255	559451	true			\$1,000.00	INV 0		
431537	true	08/06/2019 04:43:50 AM	Keying	Vivek Soni	255	1095722	true			\$200.00	INV 128		
431618	true	08/07/2019 06:11:04 AM	Keying	Vivek Soni	255	1095852	true	New World Company		\$10,000.00	859652		
441619	true	08/07/2019 06:05:39 AM	Keying	Vivek Soni	255	1095850	true	Denny Gunawan	08/02/2019	\$39.60	2013030		
441620	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020.00	00123		
441625	true	08/07/2019 04:21:18 AM	Keying	Vivek Soni	255	1095845	true						
441626	true	08/07/2019 05:56:34 AM	Keying	Vivek Soni	255	1095848	true				INV 0		
441627	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105868	true						

As you click on "GROUP BY AND SUBTOTAL", a drop-down dialog box will appear. Click on "+New" option to apply Group by and Subtotal option to the current Workflow item list as shown below and a pop-up dialog box will appear.

+ NEW REFRESH FILTER <b>GROUP BY AND SUBTOTAL</b> CHOOSE FIELDS EXPORT TO EXCEL													
<div style="border: 1px solid gray; padding: 5px;"> <p>Apply</p> <p>No records to display</p> <p>+ New</p> </div>													
18212	true						true						
18213	true						true						
305563	true						true	A Travel Company		\$305,563.00	INV 1821		
305567	true						true						
431536	true						true			\$1,000.00	INV 0		
431537	true						true			\$200.00	INV 128		
431618	true						true	New World Company		\$10,000.00	859652		
441619	true						true	Denny Gunawan	08/02/2019	\$39.60	2013030		
441620	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020.00	00123		
441625	true	08/07/2019 04:21:18 AM	Keying	Vivek Soni	255	1095845	true						
441626	true	08/07/2019 05:56:34 AM	Keying	Vivek Soni	255	1095848	true				INV 0		
441627	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105868	true						

Now, enter a name and description for the new definition and select the fields to group by and subtotal. Also, you can select **Shared with all users** option to share the current 'GroupBy and Subtotal' definition with all PaperSave users.

**Add New Definition** [Close]

Name\* : Invoice

Description : Invoice Amount

**Group By**

- ID
- Step
- Owner
- Created
- Batch
- FileName
- HasEventRaiseRights
- Vendor
- Invoice Date

**Subtotal By**

- Invoice Amount

Shared with all users

Ok Cancel

**Note:** Only the definition owner can edit or delete the shared definition. Others can only view the result.

The result will be displayed based on your definition. You can click on the hyperlink to get the list of the grouped items.

Invoice ✕

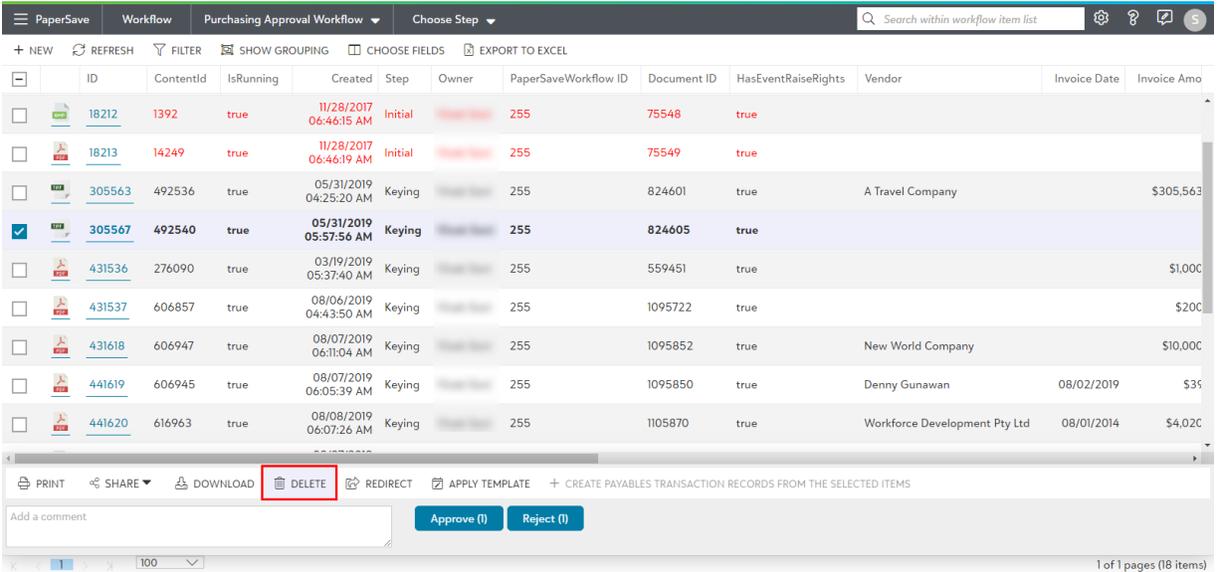
Step	Count	Sum of Invoice Amount
<u>Data_Entry</u>	3	\$1,114,275.00
Entered	2	\$4,224.00
Initial	1	\$55.00
Rejected	2	\$2,167.00
Review	4	\$13,052.00

Close

To edit or delete the existing definitions, again click on **GROUP BY AND SUBTOTAL** and see the list of all saved definitions. Now, you can click on  icon to edit and  icon to delete the existing definitions.

## DELETE

This option permanently removes the selected item from the Workflow item list. You can use this option to discard irrelevant or duplicate items from the Workflow list as shown below:



The screenshot displays a web application interface for managing workflow items. At the top, there is a navigation bar with 'PaperSave', 'Workflow', and 'Purchasing Approval Workflow' selected. Below this is a search bar and several utility icons. The main area contains a table with columns: ID, ContentId, IsRunning, Created, Step, Owner, PaperSaveWorkflow ID, Document ID, HasEventRaiseRights, Vendor, Invoice Date, and Invoice Amount. The table lists several items, with the item having ID 305567 selected. Below the table is an action bar with buttons for 'PRINT', 'SHARE', 'DOWNLOAD', 'DELETE' (highlighted with a red box), 'REDIRECT', 'APPLY TEMPLATE', and 'CREATE PAYABLES TRANSACTION RECORDS FROM THE SELECTED ITEMS'. There is also a comment field and 'Approve (1)' and 'Reject (1)' buttons. The bottom right corner shows '1 of 1 pages (18 items)'.

ID	ContentId	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amo
18212	1392	true	11/28/2017 06:46:15 AM	Initial		255	75548	true			
18213	14249	true	11/28/2017 06:46:19 AM	Initial		255	75549	true			
305563	492536	true	05/31/2019 04:25:20 AM	Keying		255	824601	true	A Travel Company		\$305,563
305567	492540	true	05/31/2019 05:57:56 AM	Keying		255	824605	true			
431536	276090	true	03/19/2019 05:37:40 AM	Keying		255	559451	true			\$1,000
431537	606857	true	08/06/2019 04:43:50 AM	Keying		255	1095722	true			\$200
431618	606947	true	08/07/2019 06:11:04 AM	Keying		255	1095852	true	New World Company		\$10,000
441619	606945	true	08/07/2019 06:05:39 AM	Keying		255	1095850	true	Denny Gunawan	08/02/2019	\$35
441620	616963	true	08/08/2019 06:07:26 AM	Keying		255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020

The Delete option will be available for the following conditions:

- If the current user has the rights to delete Workflow item for the current Workflow.
- If the current user is Workflow super user.
- If the current user is Workflow administrator for the current Workflow.

## DELETING THE WORKFLOW ITEMS

Select one or more items from the list and click on “**Delete**” button from the slide up panel. It will show a “**Delete selected items**” dialog box. Click **Yes** to proceed deleting the items.

- Upon successful deletion of the items, it will show the toast message "**Selected Workflow item(s) were deleted successfully**". The deleted items will disappear from the Workflow list.
- In case there is failure of deletion of items, then it will show a toast message, "**The delete operation failed for [List of Workflow item IDs separated by commas]**"
- In order to cancel the delete operation, Click on "**No**" to close the delete items dialog box.

**Note:** This option is visible only to the users having rights to delete the document(s).

## DOWNLOAD

This option allows you to download the selected documents from the current list.

### DOWNLOAD SINGLE DOCUMENT:

- Select a single document and click on "**DOWNLOAD**" button to initiate the document download. The downloaded file will have the below naming convention:

**[DOCUMENTID]" - "yyyyMMDD" - "hhmmss"."fileextension"**

For Example, document has following field details.

**Document ID:** 7596

**File Type:** PDF

**Created Date:** 05-Jan-2019

**Created Time:** 11:40:22 ( hh:mm:ss)

The downloaded file will have the name as: **7596-20190105-114022.PDF**

## DOWNLOAD MULTIPLE DOCUMENTS:

Select the multiple documents and click on "**DOWNLOAD**" button to initiate the document downloads. The downloaded file will have below naming convention. It will create a file containing all the selected documents with the name of the zip file as:

"Documents of " + [**DOCUMENTTYPENAME**] + " document type - " + **yyyyMMDD** + " - " **hhmmss.-fileextension**

Each document's name within the zip file will have the below naming convention:

[**DOCUMENTID**] + " - " + **yyyyMMDD** + " - " **hhmmss.fileextension**

## FILTER

You can narrow down the list of documents using filter option by applying conditions on the column headers in the list. This enables you to reduce the scope of item list in case of disproportionate number of items in the list.

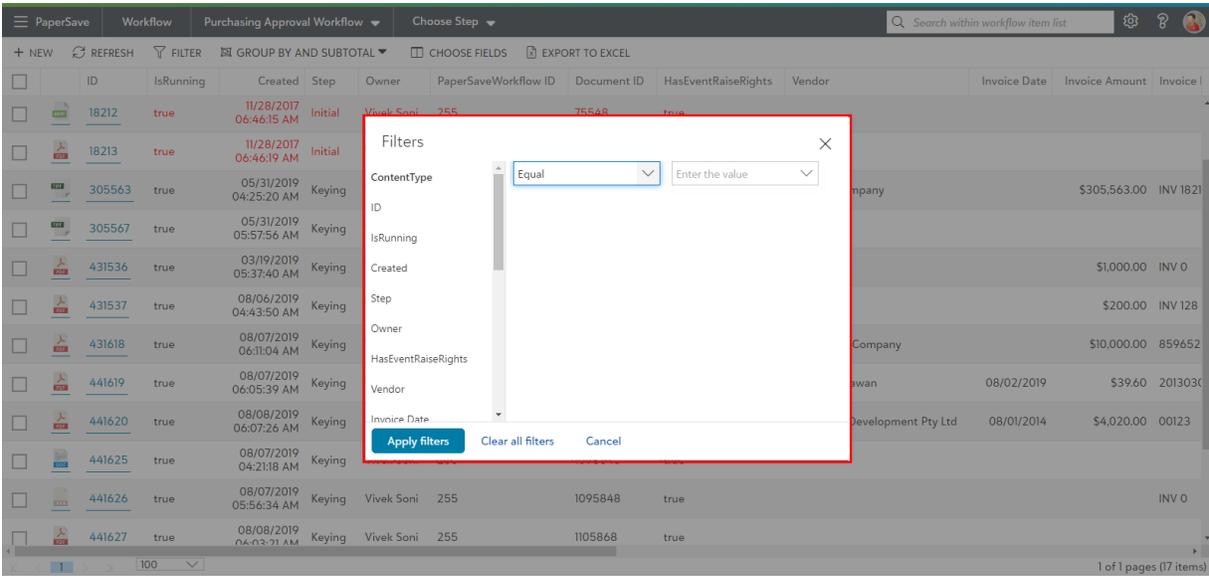
PaperSave		Workflow		Purchasing Approval Workflow		Choose Step		Search within workflow item list				
+	NEW	REFRESH	FILTER	GROUP BY AND SUBTOTAL	CHOOSE FIELDS	EXPORT TO EXCEL						
ID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount	Invoice I	
18212	true	11/28/2017 06:46:15 AM	Initial	Vivek Soni	255	75548	true					
18213	true	11/28/2017 06:46:19 AM	Initial	Vivek Soni	255	75549	true					
305563	true	05/31/2019 04:25:20 AM	Keying	Vivek Soni	255	824601	true	A Travel Company		\$305,563.00	INV 1821	
305567	true	05/31/2019 05:57:56 AM	Keying	Vivek Soni	255	824605	true					
431536	true	03/19/2019 05:37:40 AM	Keying	Vivek Soni	255	559451	true			\$1,000.00	INV 0	
431537	true	08/06/2019 04:43:50 AM	Keying	Vivek Soni	255	1095722	true			\$200.00	INV 128	
431618	true	08/07/2019 06:11:04 AM	Keying	Vivek Soni	255	1095852	true	New World Company		\$10,000.00	859652	
441619	true	08/07/2019 06:05:39 AM	Keying	Vivek Soni	255	1095850	true	Denny Gunawan	08/02/2019	\$39.60	2013030	
441620	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020.00	00123	
441625	true	08/07/2019 04:21:18 AM	Keying	Vivek Soni	255	1095845	true					
441626	true	08/07/2019 05:56:34 AM	Keying	Vivek Soni	255	1095848	true				INV 0	
441627	true	08/08/2019 06:03:21 AM	Keying	Vivek Soni	255	1105868	true					

Follow the below steps to apply "**FILTER**" in the current list:

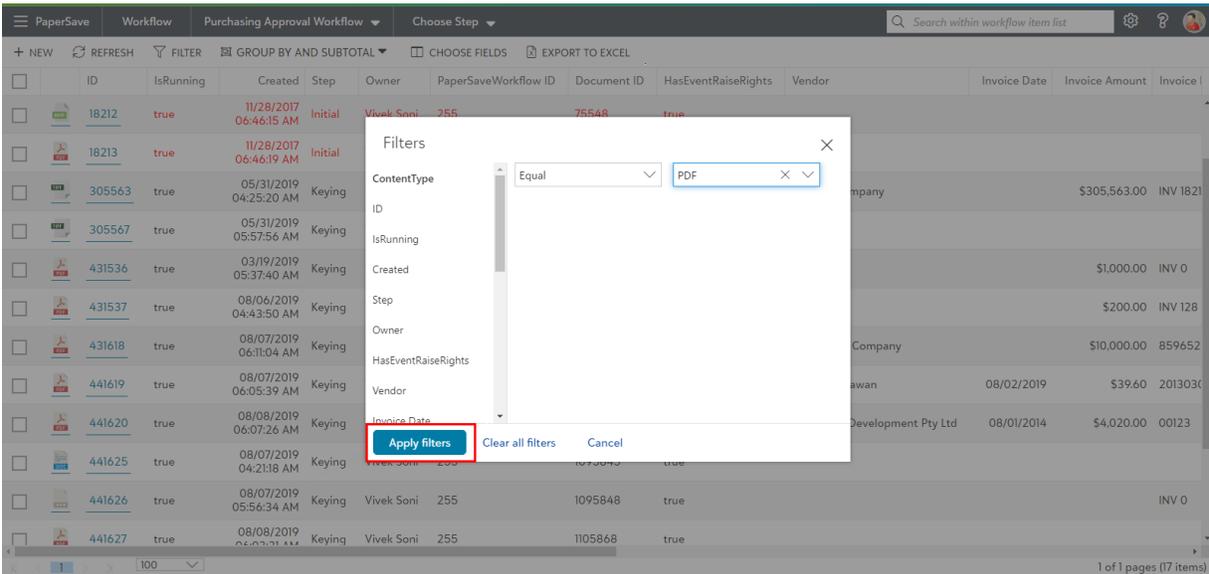
1. Click on the "**FILTER**" button in the list toolbar.
2. It shall open the "**Filters**" dialog box.
3. List of columns on which filters can be applied will appear on the left side of the dialog.
4. Set single or multiple conditions on a single or multiple columns.
  - Select the **Operator** for desired column.
  - Select the **Operand** for the desired column.
  - You can add more conditions on another column , **Select** the **operator**.
  - Enter the value for the **operand**.
  - Click on "**Apply Filters**".
5. It shall show the result with **list** of documents based on the filters set.

For Example - Let's say we want to filter out the Workflow items for selected Workflow having file extension "GIF".

1) Click on **FILTER** button in Workflow list toolbar. This will launch the below screen.



2) Enter the Filter Condition as **ContentType equal PDF** and click on Apply Filters.



3) On Applying Filters, you will get respective list of Workflow items with an extension "PDF" as shown in below screen:

ID	IsRunning	Created	Step	Owner	PaperSaveWorkflow ID	Document ID	HasEventRaiseRights	Vendor	Invoice Date	Invoice Amount	Invoice #
18213	true	11/28/2017 06:46:19 AM	Initial	Vivek Soni	255	75549	true				
431536	true	03/19/2019 05:37:40 AM	Keying	Vivek Soni	255	559451	true			\$1,000.00	INV 0
431537	true	08/06/2019 04:43:50 AM	Keying	Vivek Soni	255	1095722	true			\$200.00	INV 128
431618	true	08/07/2019 06:11:04 AM	Keying	Vivek Soni	255	1095852	true	New World Company		\$10,000.00	859652
441619	true	08/07/2019 06:05:39 AM	Keying	Vivek Soni	255	1095850	true	Denny Gunawan	08/02/2019	\$39.60	2013030
441620	true	08/08/2019 06:07:26 AM	Keying	Vivek Soni	255	1105870	true	Workforce Development Pty Ltd	08/01/2014	\$4,020.00	00123
441627	true	08/08/2019 06:03:21 AM	Keying	Vivek Soni	255	1105868	true				
441628	true	08/07/2019 06:09:42 AM	Keying	Vivek Soni	255	1095851	true				
441629	true	08/08/2019 06:17:04 AM	Keying	Vivek Soni	255	1105876	true	Transport & Logistics	01/01/2014	\$4,020.00	00123
441632	true	08/08/2019 06:22:08 AM	Keying	Vivek Soni	255	1105879	true				

## ADDING CONDITIONS

- You can add multiple conditions on a single column by clicking on the "Add Condition" button.
- Once you click on the Add Condition button, then it will **display** one more set of Operator-Operand pair.

**Note:** The maximum number of conditions that can be added across all the fields is 10.

## GROUPING THE CONDITIONS

1. Lets suppose that you have added multiple conditions to a single column, and now you need to **group** those multiple **conditions**.
2. Select the consecutive conditions which needs to be grouped using the checkbox per condition.
3. Once conditions are selected, then you need to click on the Grouping button.

**Note:** Grouping will be only enabled for consecutive conditions. If no grouping is applied when there exist multiple conditions for a single column, then the result would be based on the order and the relationship (AND, OR) between those conditions

## DELETE CONDITIONS

- You can remove the manually added condition by clicking on the Delete/Trash icon.
- In case, if there exists more than one manually added conditions i.e. condition 1 (default), 2 (manual) and 3 (manual), if you delete condition # 2, then it will append Condition 1 and 3 keeping the relationship between 1 and 3 same as it was between 2 and 3.

**Note:** You cannot delete the condition if that is the only condition for the current column.

## Adding conditions on multiple columns

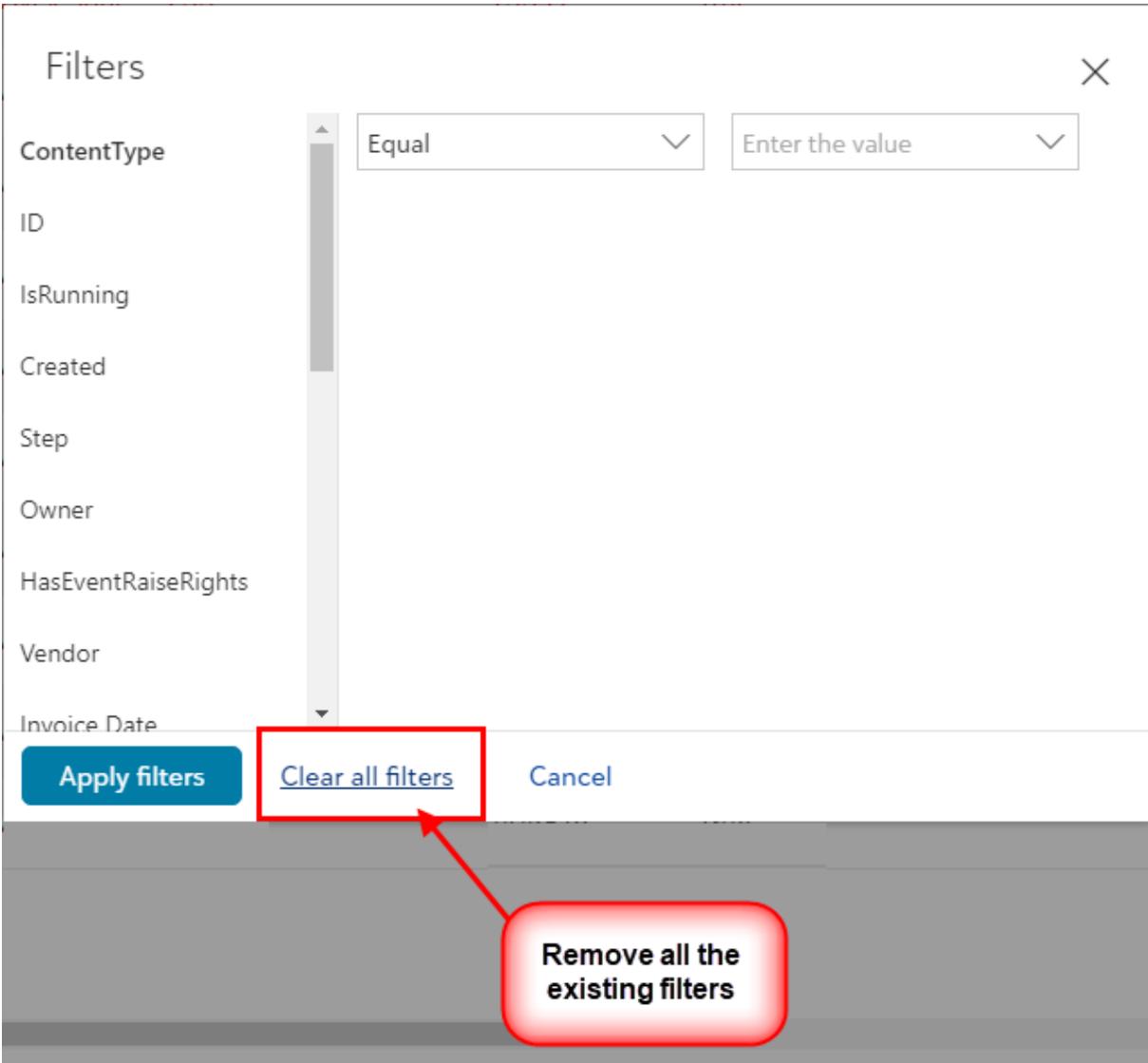
You can filter the items by putting conditions on multiple columns by first selecting the column and adding conditions to it. Then, select another column and add conditions to it and so on.

## APPLYING FILTERS

- Once you have added all the filtering conditions, Click on the “**Apply Filters**” button to see the effect of the filters on the list.

## CLEARING FILTERS

- You can click on “**Clear all filters**” if you have mentioned the filtering conditions and you need to remove the filters and re-write the conditions again.



- Clicking on “**Clear All Filters**” will remove all the filters set across all the columns.

**Note:** You can also click on **Filter Applied** button to edit the applied conditions and **Clear Filter** button from the Status bar to directly clear the applied filter.

## CANCELLING FILTERS

- If you do not wish to add filters while the add filters dialog is open, then clicking on "**Cancel**" or "**X**" button in top-right of the dialog box or "**Esc**" key will exit the filter operation and close the filters window.

## JOIN SELECTED ITEMS

This option allows you to merge two or more workflow items of any image type (i.e. pdf, tiff, gif, jpg, bmp, etc.) from the workflow item list.

**Note:** To perform the Join operation, you must have any of the below rights:

- Edit content and delete rights on the workflow
- Workflow Administrator
- Super Admin

**Note:** This option is enabled only when the selected items are present in the same workflow step and do not belong to the completed step.

Follow the below steps to merge the workflow items from the Workflow item list:

- 1) Click on any rows or checkboxes to select two or more items from the list. The items don't need to be consecutive.
- 2) Now, click on the **Join Selected Items** option from the slide-up panel as shown in the below screen.

The screenshot shows a workflow management interface with a table of items. The 'JOIN SELECTED ITEMS' button is highlighted with a red box. Below the table, there is a comment field and a 'Keyed (3)' button.

ID	Created	Step	Owner	Batch	FileName	Vendor	Bill No	Transaction Amount	Bill Date	Description
1019788	2020-04-02 08:57:14 AM	Errored	suraj lal patel		johndoe1000.tif	netli	9988775	\$1,000.00	2020-02-28	No description
1352571	2020-11-02 02:57:58 AM	Keying	suraj lal patel		COMCAST_02-01-2016_\$25957.tif	Comcast			2020-11-27	
1352572	2020-11-02 02:57:58 AM	Keying	suraj lal patel		CHECKALT_45367_01-29-2016_\$495.83.PDF	CheckAlt			2020-11-27	
1352573	2020-11-02 02:58:01 AM	Keying	suraj lal patel		DIVERSIFIED_ADMIN_36346_02-05-2016_\$606.50.pdf	Diversified			2020-11-27	
1352574	2020-11-02 02:58:04 AM	Keying	suraj lal patel		COMCAST_02-01-2016_\$25957.PDF	Comcast			2020-11-27	
1352575	2020-11-02 02:57:58 AM	Keying	suraj lal patel		CHECKALT_45367_01-29-2016_\$495.83.tif	CheckAlt			2020-11-27	
1352576	2020-11-02 02:58:02 AM	Keying	suraj lal patel		CATAMARAN_01-25-2016_\$1377.00.pdf	Protective			2020-11-27	
1352577	2020-11-02 02:57:58 AM	Keying	suraj lal patel		CATAMARAN_01-25-2016_\$1377.00.tif	Protective			2020-11-27	
1352578	2020-11-02 02:57:58 AM	Keying	suraj lal patel		DIVERSIFIED_ADMIN_36346_02-05-2016_\$606.50.tif	Diversified			2020-11-27	

3) The "Merge item actions" dialog box will appear as shown in the below screen, where you can move items up and down using the double ellipses to set the order of the merged item's content.

The screenshot shows the 'Merged item actions' dialog box. It contains a table with the following data:

ID	Created	Step	Owner	Batch	FileName	Vendor
1352576	2020-11-02 02:58:02 AM	Keying	suraj lal patel		CATAMARAN_01-25-2016_\$1377.00.pdf	Protective
1352580	2020-11-02 06:19:59 AM	Keying	suraj lal patel	DB-2011021649	Add new Workflow from configure area.jpg	Joe

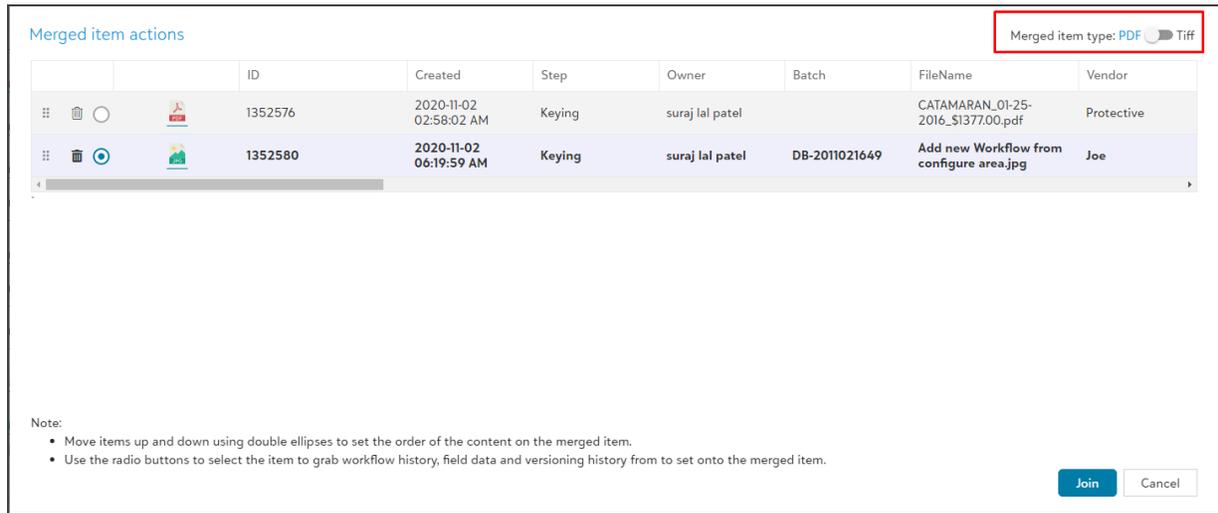
Note:

- Move items up and down using double ellipses to set the order of the content on the merged item.
- Use the radio buttons to select the item to grab workflow history, field data, and versioning history from to set onto the merged item.

Buttons: Join, Cancel

4) Choose the item using the radio buttons to acquire its workflow history, field data, and versioning history for the merged item.

- If the selected item is not Tiff/PDF, then the "Merge item type" option appears in the top right corner of the dialog box as shown in the below screen. This option contains a toggle switch to choose between PDF or Tiff type for the merged item.

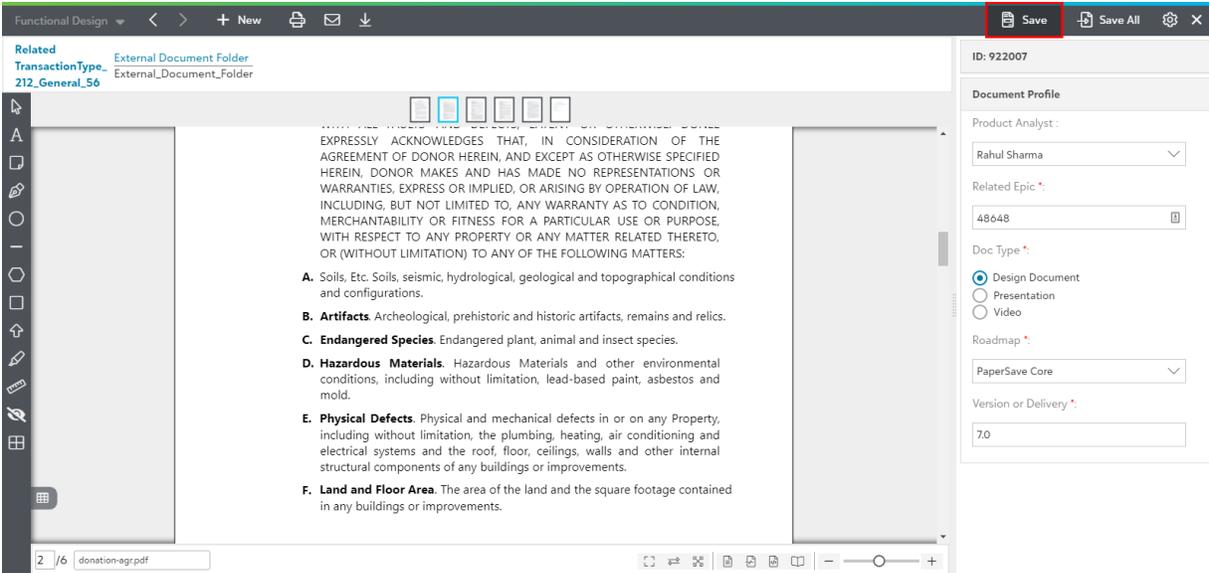


- Select Tiff from the toggle option to merge the documents with type "Tiff". Similarly, choose PDF from the toggle to merge the documents with the type "PDF".

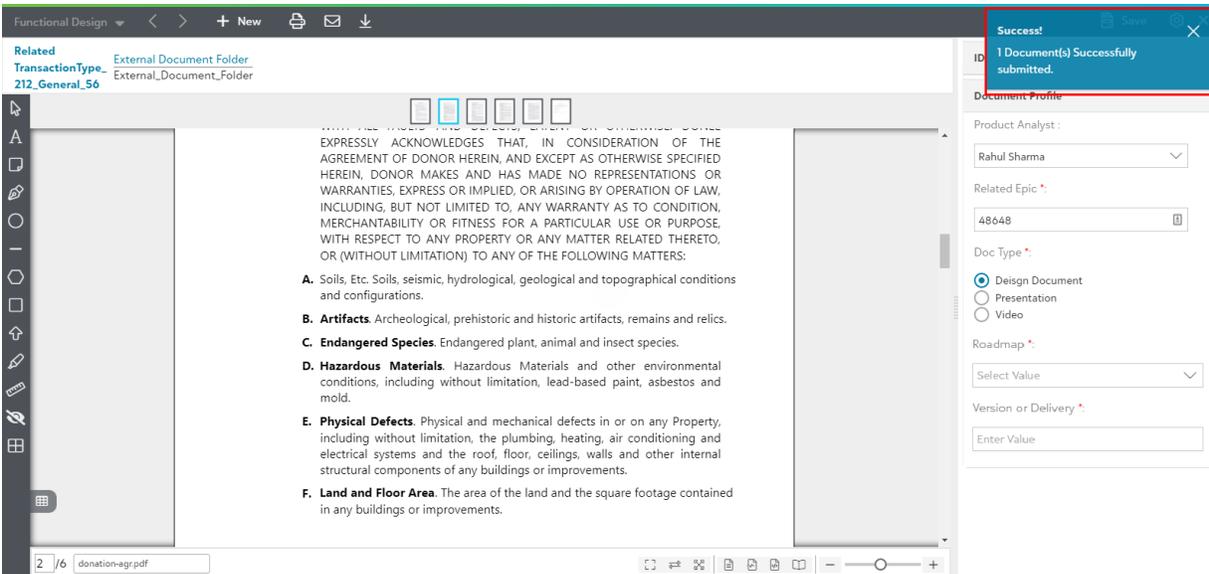
**Note:** By default, PDF type is selected.

## Save the PaperSave document

You can save the document to submit it to selected document type in PaperSave once you are done with the validation. Click on the Save option in the top level toolbar of the document viewer as shown below:



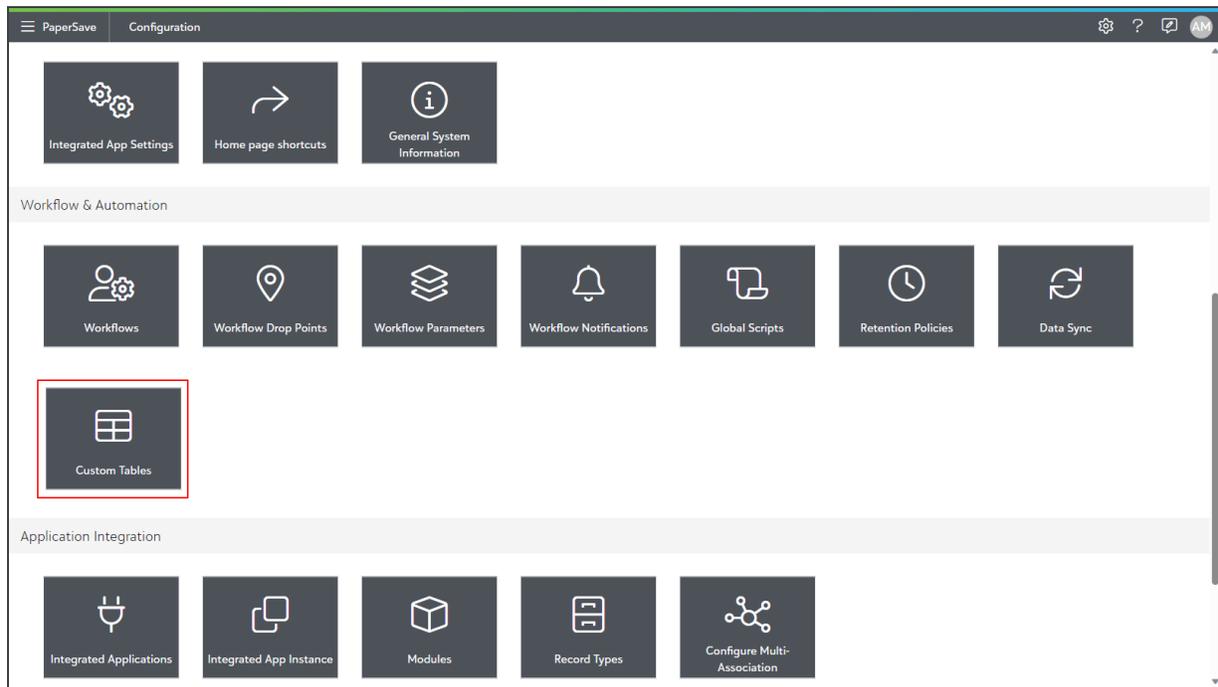
The app will display a toast notification in the top-right corner of the screen showing the submission success as shown below. Similarly, it shall display a failure notification in case of the submission failure.



## Importing rows into the Custom Tables

To import rows to the custom table, follow the below steps:

- 1) Click on the Custom Tables tile in the **Workflow and Automation** section of the **Configuration Area**.



- 2) Now, the Custom Tables list view page opens, click on the desired custom table from the list as shown below.

Configuration Custom Tables

+ ADD CHOOSE FIELDS EXPORT TO EXCEL REFRESH

	Name
<input type="checkbox"/>	AA Distribution
<input type="checkbox"/>	CT VW Test1
<input type="checkbox"/>	RS TEST New updated Name 12DEC2023
<input type="checkbox"/>	CT1
<input type="checkbox"/>	CT 2
<input type="checkbox"/>	CT3
<input type="checkbox"/>	GL Distribution Defaults
<input type="checkbox"/>	ACCOUNT INFORMATION

1 of 1 pages (8 items)

3) Click on the **Import** option from the list toolbar as shown below.

Configuration Custom Tables ACCOUNT INFORMATION

Details

Custom Table Name\*:  [Delete custom table](#)

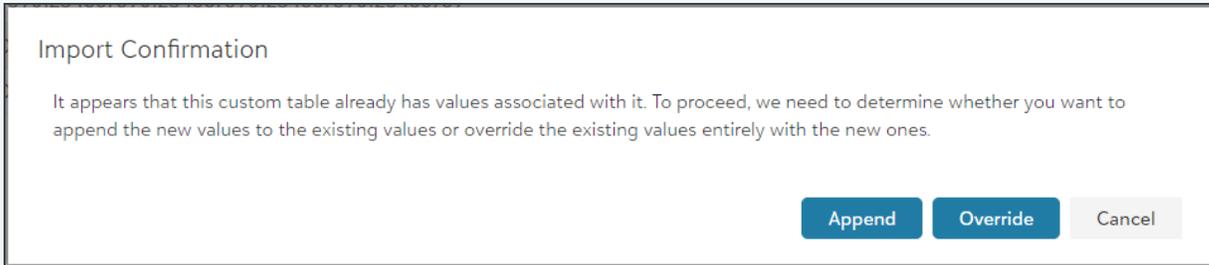
Custom Table

+ ADD COLUMN + ADD ROW EDIT SELECTED ROW DELETE SELECTED ROW UPDATE ROW CANCEL ROW EDITING EXPORT TO EXCEL IMPORT REFRESH

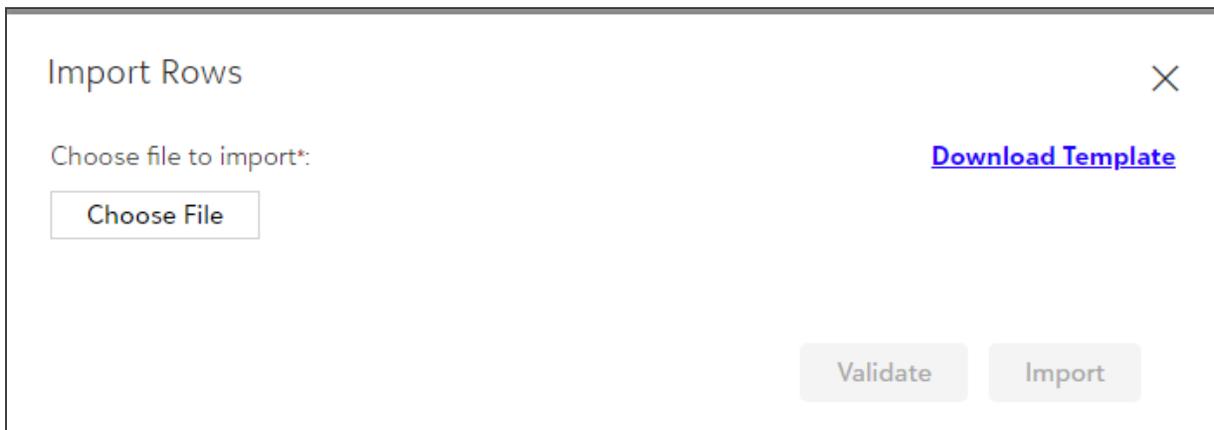
	Account Number	Description	Approvers
<input type="checkbox"/>	10235698	Account number	Dhruvika Bhatt
<input type="checkbox"/>	89562487	Account Number	Abhishek Miriyala

1 of 1 pages (2 items)

**Note:** When there is any row in the custom table and you click on the IMPORT button, then the confirmation notification appears on the screen, asking the user to either append new rows to existing ones in the table or override existing rows with the new rows.



4) The import custom table notification pops up on the screen as shown below.



5) Now, click on the Download template to download the .CSV file, if not downloaded.

Import Rows

Choose file to import\*:

Choose File

[Download Template](#)

Validate Import

6) Once the file is downloaded, open the file, fill in all the required details and save it.

**Note:** Within the .CSV file, the rows must have the values in the following format based on the selected column type.

Number column type: It allows 13 values including 4 decimal values.

Example: 145632256.0000

String column type: It allows only string values upto 120 characters.

Example: Abcfg1235

Date Column type: The format of the date should be in "MM/dd/yyyy".

Example: 12/31/2023

User column type: It should contain the user name as present in user profile page.

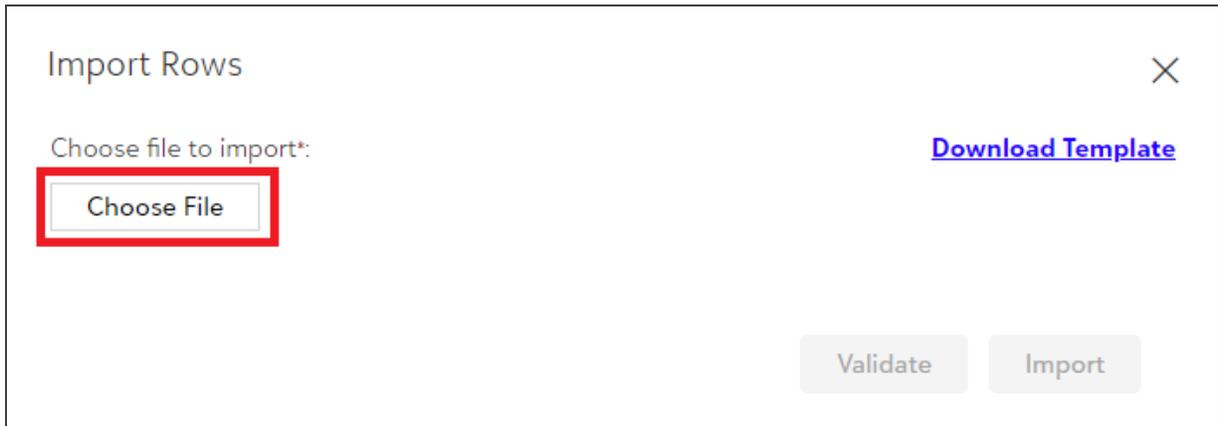
- For Azure Authentication - User name field should have Email.

Example: padcvddd@pairsoft.com

- For Native Authentication - User name field should have "User name followed by tenant id"

Example: amiriyalapsservices

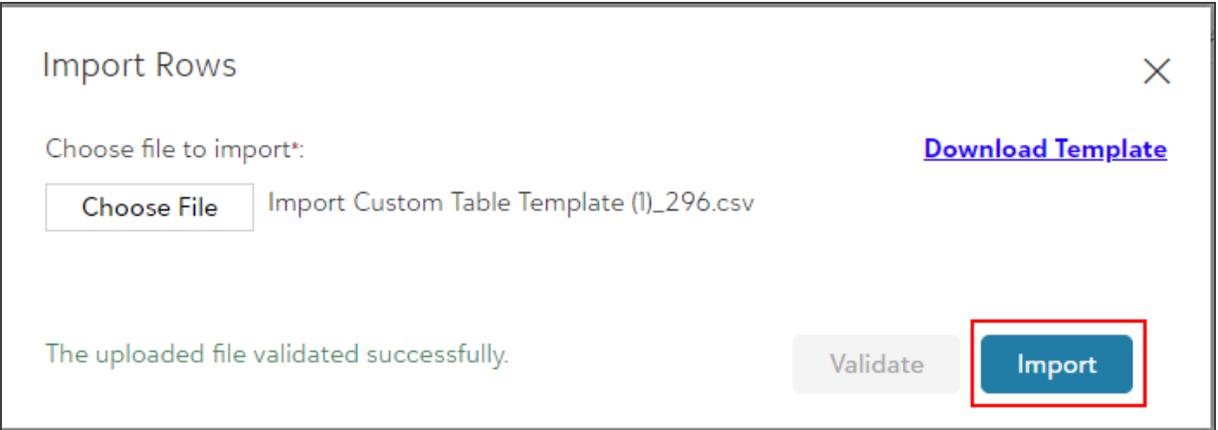
7) Now, upload the saved file, by clicking on the **Choose File** button as shown below.



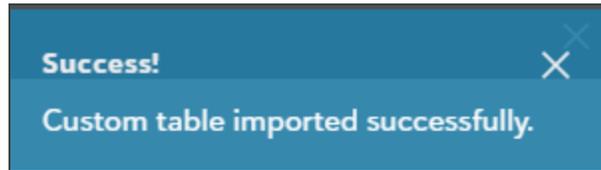
8) After uploading the file, the **Validate** option gets enabled, click on the **Validate** option so that it validates the content in the file uploaded.



9) After successful validation, the **Import** option gets enabled, by clicking on it, the information gets imported to the rows within the column.

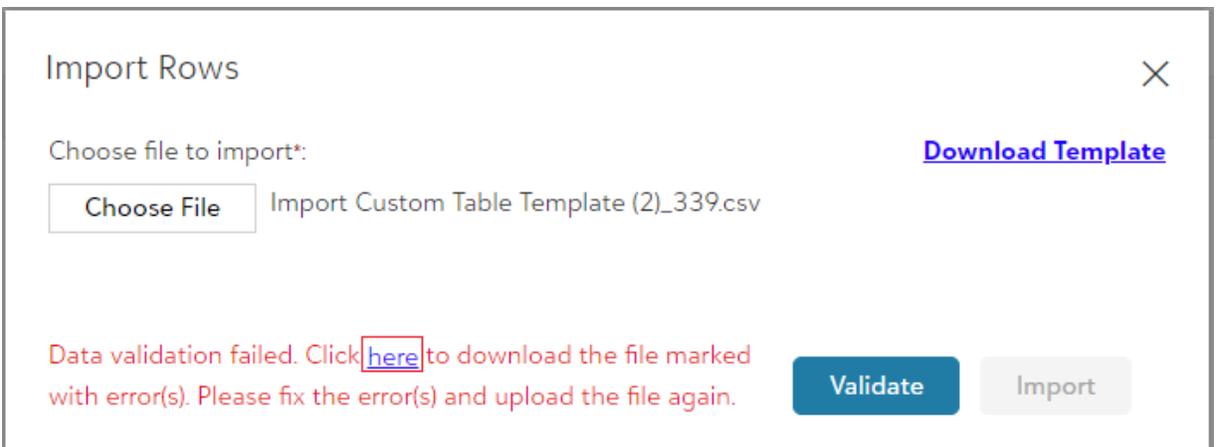


10) A successful notification appears on the top-right corner of the screen as shown below.



11) While validating the uploaded file, you might encounter the following error:

- If the uploaded file has incorrect details, then you get a message as shown below.



- Now, click on the "here" hyperlink as shown above to view the error details.

- After making the necessary corrections, jump to **Step 7** and perform the further steps.

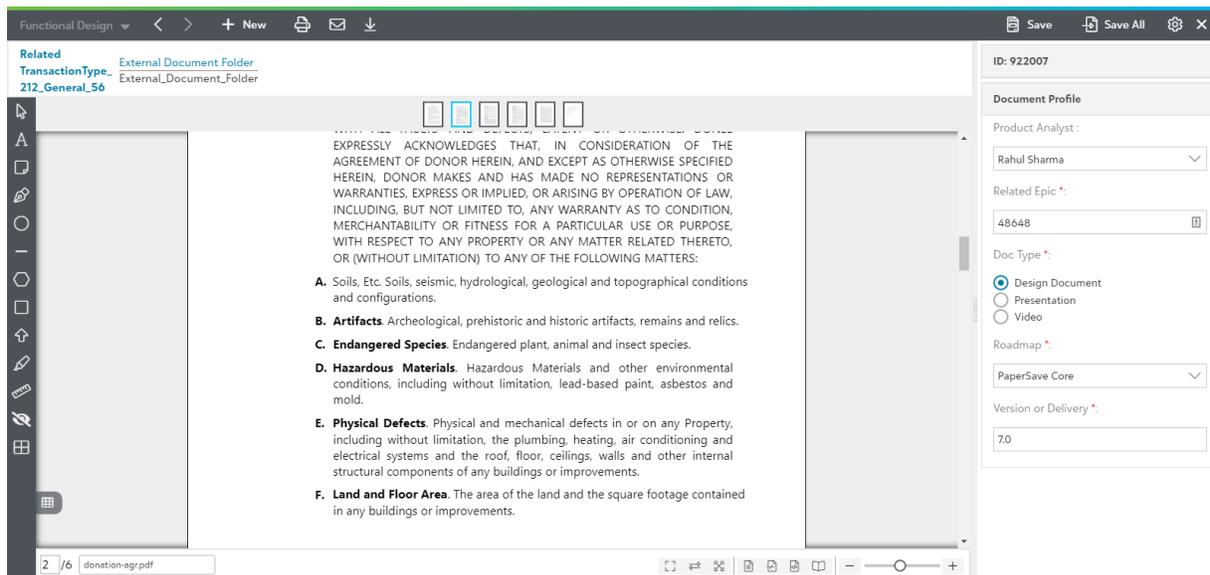
**Note:** If the two rows having the same data within the .CSV file, only a single row gets imported.

**Tip:** If a .CSV file contains a completely blank row within the data, the import process includes the data up to the blank row, and any data following the blank row is not imported.

**Note:** If a string column in the .CSV file contains more than 120 characters, then on uploading, it automatically gets trimmed to 120 characters. It takes first 120 characters without giving any error while validation.

## Validate the PaperSave document

Unsubmitted documents can be worked on from the item list and opened in the document viewer once they are acquired successfully. Various operations can be performed on the documents while working with them in the document viewer such as editing fields, adding annotations, submit gift item etc.



You can explore various topics for validating the documents:

- [Review and edit profile fields](#)
- [Using Annotations on the document](#)
- [Page Manipulation View](#)
- [item list panel](#)
- [display options in the Status Bar](#)

## PRINT

This option enables you to print the selected Workflow item from the Workflow item list.

### **Note:**

- 1) Print option will be only allowed if a single Workflow item is selected. In case, multiple items are selected, then the Print button will be disabled.
- 2) This option also prints the annotations on the document, if any.

## REDIRECT

This option is used to change the step of Workflow item if it is not in an appropriate Workflow step, change Workflow or the Step Owner.

Watch the [video](#) to learn different available options to redirect a Workflow item.

Clicking on the Redirect option will prompt you with dialog box to select any of the following option(s):

- Change Step
- Change Workflow
- Change Owner

How do you wish to redirect these items? ×

Change Step

Change WorkFlow

Change Owner

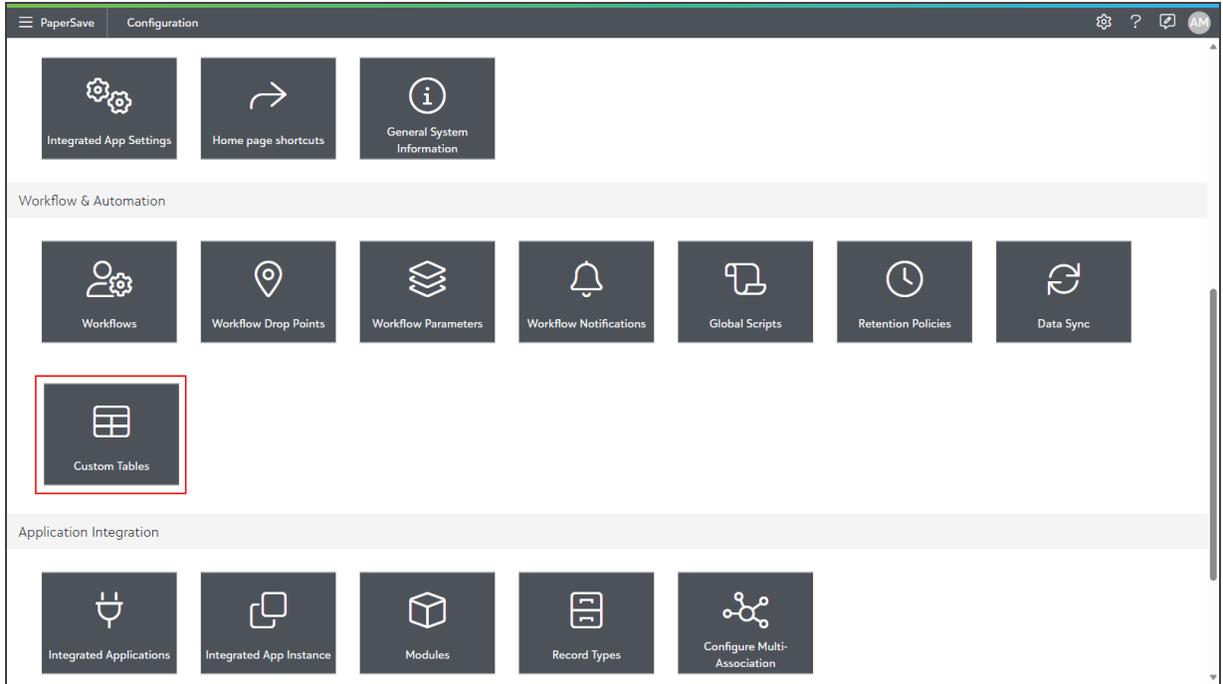
**NEXT**

**Tip:** The user must have the Workflow rights "Groups/Users that are allowed to move items from this workflow to another workflow" to redirect the Workflow items.

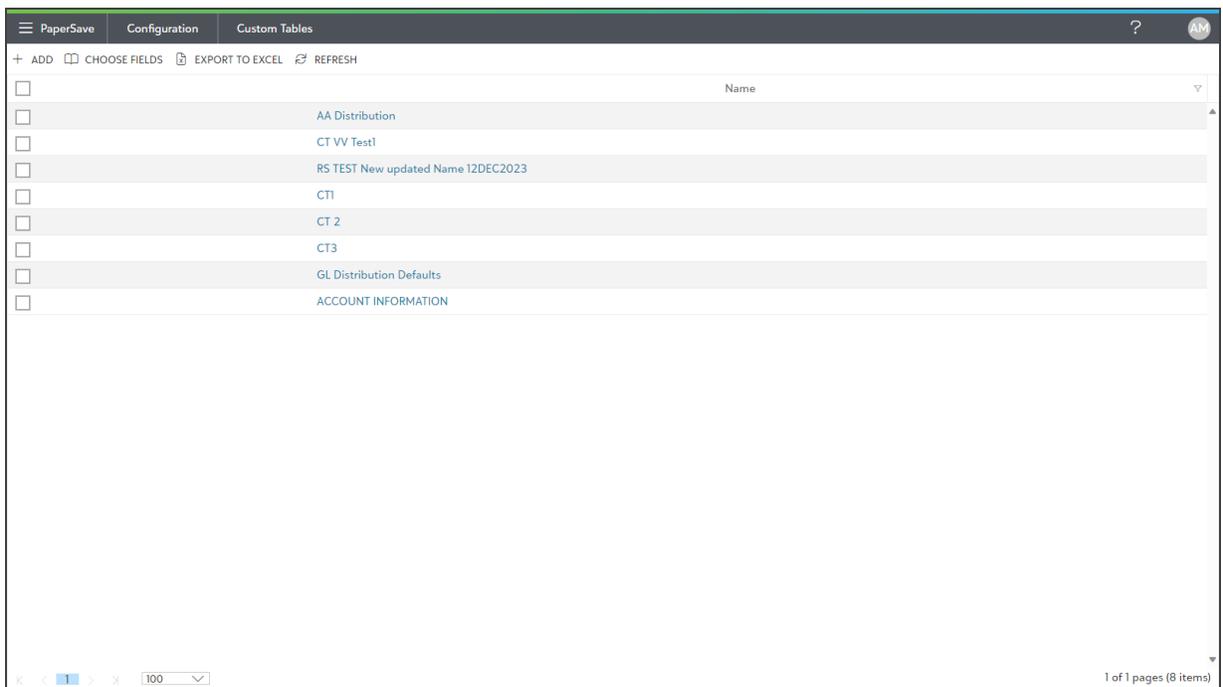
## Importing rows into the Custom Tables

To import rows to the custom table, follow the below steps:

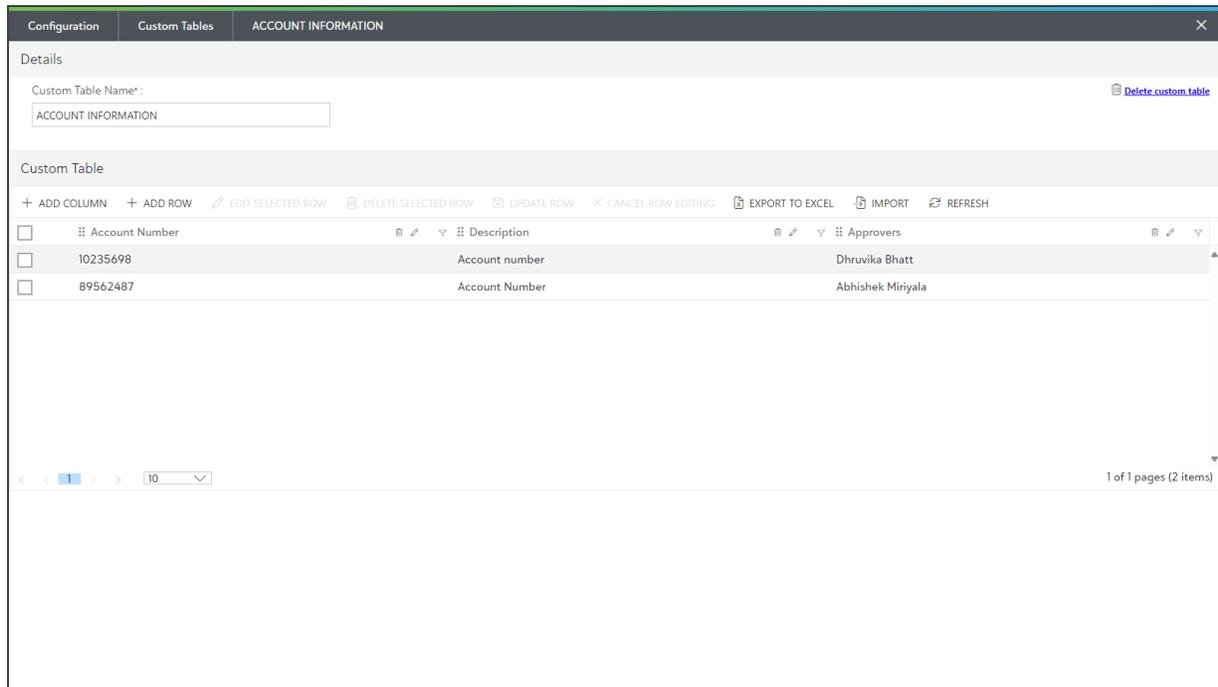
- 1) Click on the Custom Tables tile in the **Workflow and Automation** section of the **Configuration Area**.



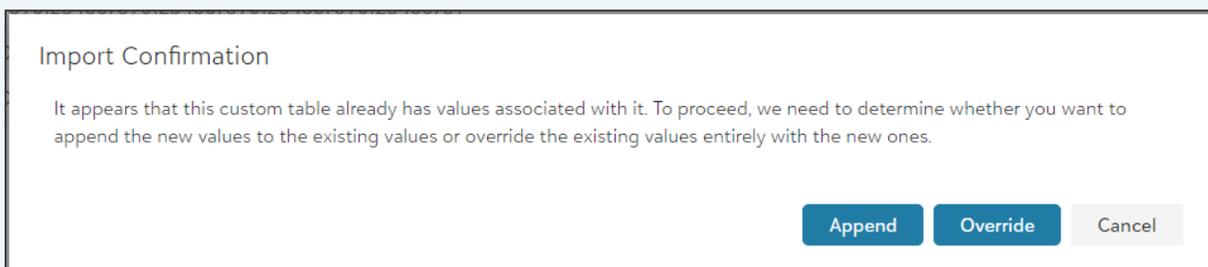
2) Now, the Custom Tables list view page opens, click on the desired custom table from the list as shown below.



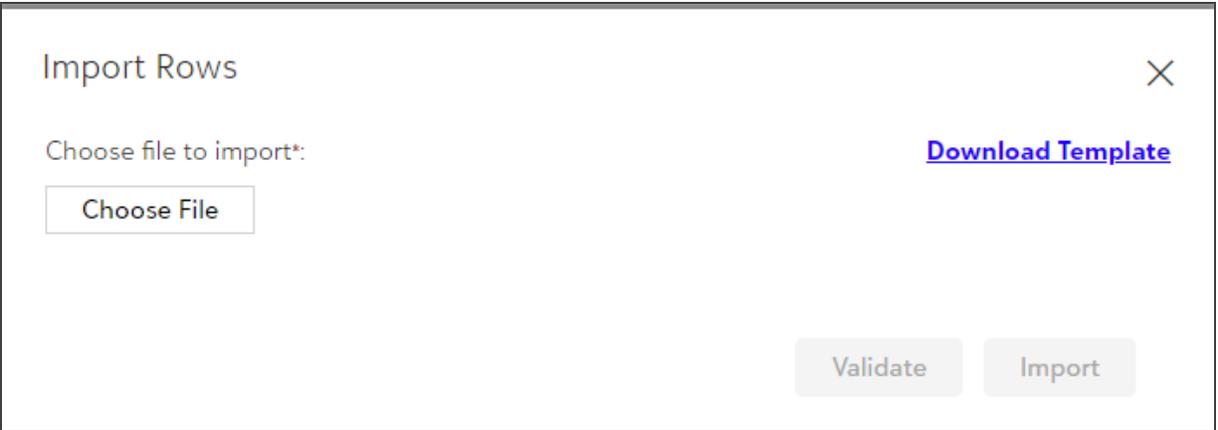
3) Click on the **Import** option from the list toolbar as shown below.



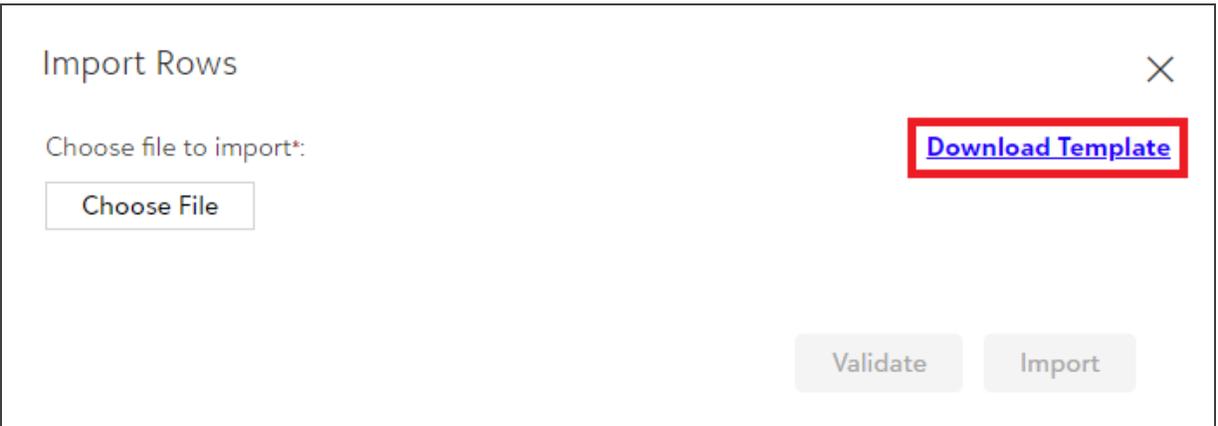
**Note:** When there is any row in the custom table and you click on the IMPORT button, then the confirmation notification appears on the screen, asking the user to either append new rows to existing ones in the table or override existing rows with the new rows.



4) The import custom table notification pops up on the screen as shown below.



5) Now, click on the Download template to download the .CSV file, if not downloaded.



6) Once the file is downloaded, open the file, fill in all the required details and save it.

**Note:** Within the .CSV file, the rows must have the values in the following format based on the selected column type.

Number column type: It allows 13 values including 4 decimal values.

Example: 145632256.0000

String column type: It allows only string values upto 120 characters.

Example: Abcfg1235

Date Column type: The format of the date should be in "MM/dd/yyyy".

Example: 12/31/2023

User column type: It should contain the user name as present in user profile page.

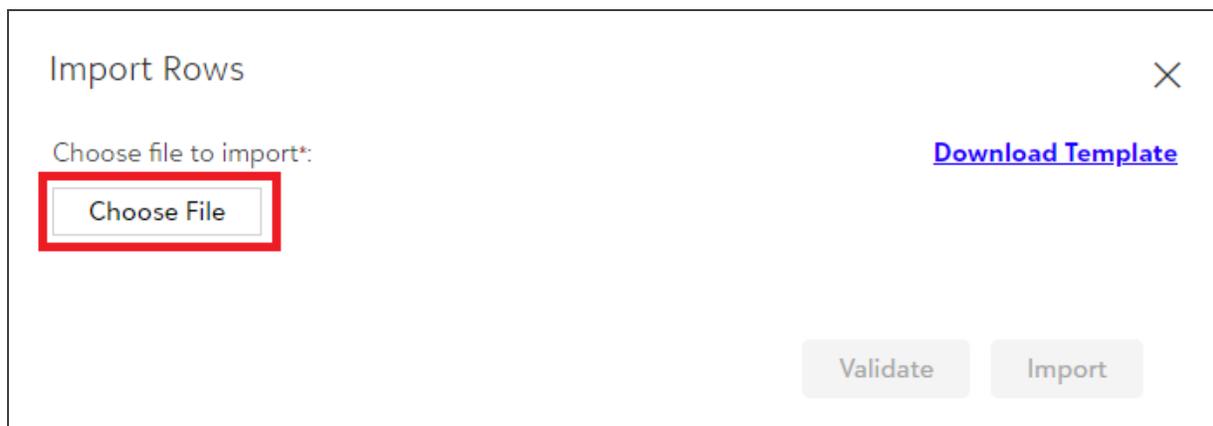
- For Azure Authentication - User name field should have Email.

Example: padcvddd@pairsoft.com

- For Native Authentication - User name field should have "User name followed by tenant id"

Example: amiriyalapsservices

7) Now, upload the saved file, by clicking on the **Choose File** button as shown below.



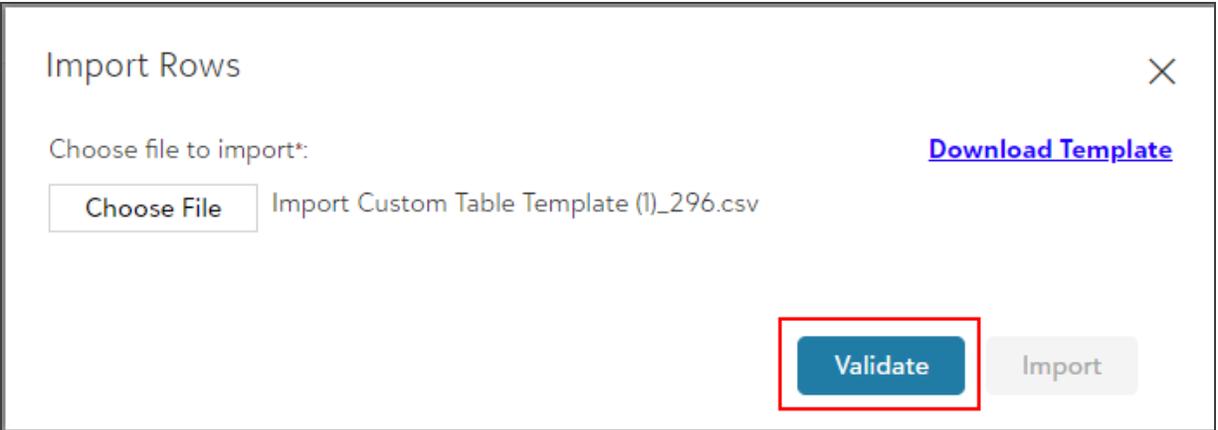
Import Rows ×

Choose file to import\*: [Download Template](#)

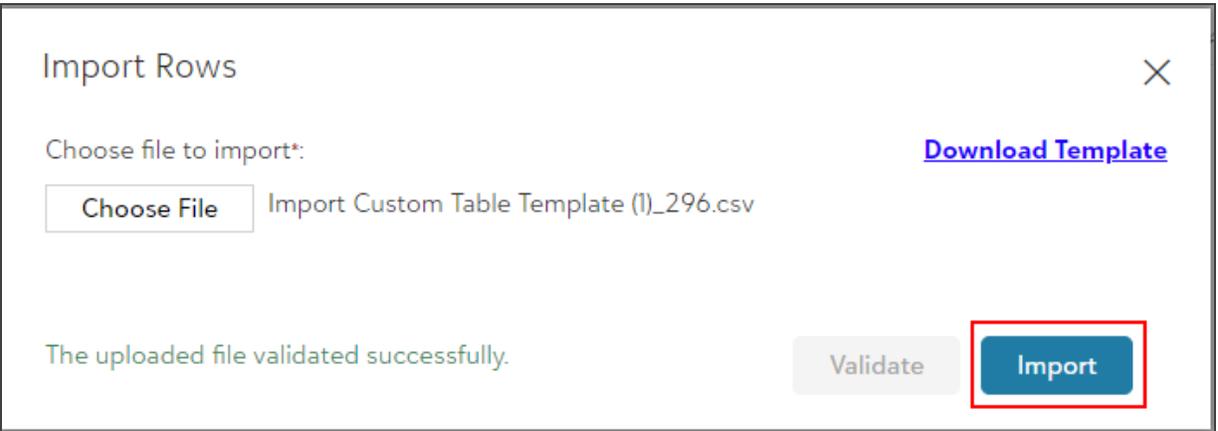
**Choose File**

Validate Import

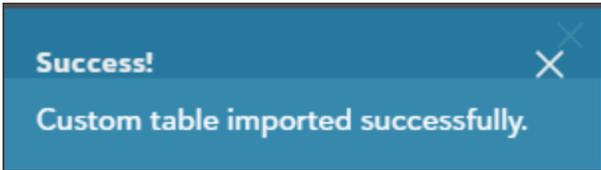
8) After uploading the file, the **Validate** option gets enabled, click on the **Validate** option so that it validates the content in the file uploaded.



9) After successful validation, the **Import** option gets enabled, by clicking on it, the information gets imported to the rows within the column.

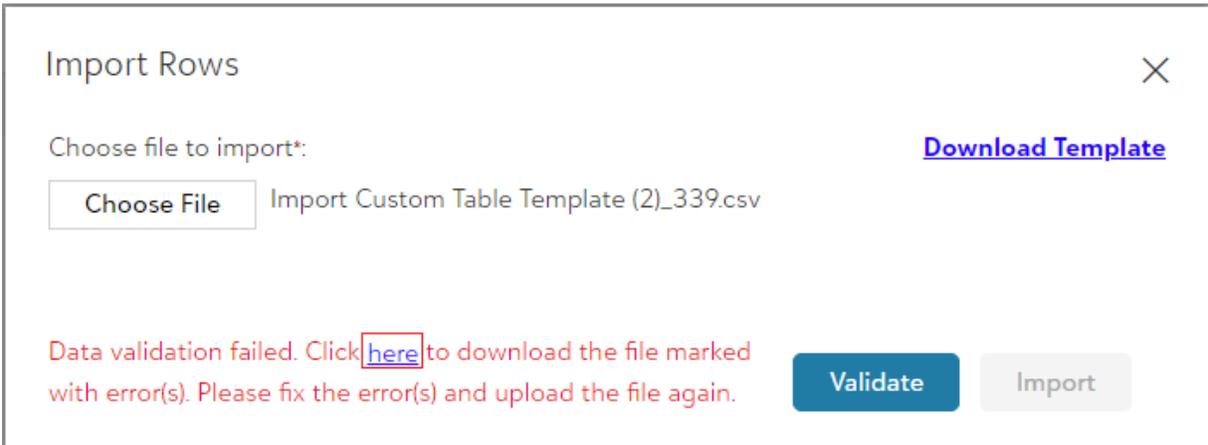


10) A successful notification appears on the top-right corner of the screen as shown below.



11) While validating the uploaded file, you might encounter the following error:

- If the uploaded file has incorrect details, then you get a message as shown below.



- Now, click on the "here" hyperlink as shown above to view the error details.
- After making the necessary corrections, jump to **Step 7** and perform the further steps.

**Note:** If the two rows having the same data within the .CSV file, only a single row gets imported.

**Tip:** If a .CSV file contains a completely blank row within the data, the import process includes the data up to the blank row, and any data following the blank row is not imported.

**Note:** If a string column in the .CSV file contains more than 120 characters, then on uploading, it automatically gets trimmed to 120 characters. It takes first 120 characters without giving any error while validation.

## PaperSave Variables for Script Execution

You can use the below mentioned variables while executing script using Profile:

- **SMTP** For SMTP IP/Server
- **SMTP\_USER** - User configured for SMTP
- **SMTP\_PASSWORD** - Password configured for SMTP
- **FROMEMAIL** - from email configured for SMTP

- **SMTP\_PORT** -port for SMTP
- **QUEUEITEM\_ID** - Current Workflow Item's identification number
- **WORKFLOWITEM\_ID** - Current workflow item's identification number (here the terminology used is different but the value obtained is same as QUEUEITEM\_ID)
- **QUEUE\_ID** Current Workflow Item's queue identification number
- **WORKFLOW\_ID** - Current Workflow Item's workflow identification number
- **QUEUE\_NAME** Current Workflow Item's queue name
- **WORKFLOW\_NAME** - Current Workflow Item's workflow name
- **QUEUEITEM\_FILENAME** - Current Workflow Item's file name
- **DOCUMENT\_ID** - Document identification number
- **USER** Current user's name (i.e. domain\user)
- **CURRENT\_STATE** - Current state for the Workflow Item
- **CURRENT\_STEP** - Current step for the workflow item (here the terminology used is different but the value obtained is same as CURRENT\_STATE)
- **PARENTID** - Parent host record identification key for the associated document
- **DOCUMENT\_TYPE** - Current document s document type name
- **TRANSACTION\_TYPE** - Current document s transaction type name
- **MODULE** - Current document module name
- **HOSTAPPLICATION** - Current document s host application name
- **USERS\_GROUP** - Current user's groups
- **HAS\_BEEN\_ASSOCIATED** - If current document is associated to any Workflow Item this will be case sensitive checking i.e. True or False
- **IS\_ASSOCIATED** - If current document is associated to any Workflow Item this will be case insensitive checking
- **CUSTOMEVENT\_NAME** - Use customevent branch name in the pre script.

- **CURRENT\_OWNER** - This gives you the value of the current owner of the workflow item
- **PAPERSAVE\_CONNECTION\_STRING** - This is used for connecting to PaperSave database
- **DAYS\_IN\_CURRENT\_STEP\_OWNER** - No. of days the Workflow Item is in the Current Step or with the Current Owner.
- **DAYS\_IN\_CURRENT\_STEP** - No. of days the Workflow Item is in the Current Step.
- **Document\_Created\_By** - Name of Workflow User who created the document. (specific to Workflow Forms)

# Validate the documents

Unsubmitted Workflow items can be worked on from item list and opened in the item viewer once they are acquired successfully. Various operations can be performed on the items while working with them in the item viewer such as editing fields, adding annotations, submit items, etc.

The following are the topics covered in Validate document section:

- [Top level Toolbar in item viewer](#)
- [Review and edit profile fields](#)
- [Using Annotations on the document](#)
- [Page Manipulation View](#)
- [item list panel](#)
- [display options in the Status Bar](#)
- [Settings in the item viewer](#)

## Global Scripts

Global Scripts allows you to define scripts globally that can be utilized in the following PaperSave modules:

- Workflow Event PreScript
- Workflow Event PostScript
- Workflow Script activity
- Field events

**Note:** You can include the Global Script by writing **PaperSave.IncludeScript.ScriptName** in the Script Editor window.

Watch the [video](#) to know how to define and manage Global Scripts.

## Javascript Intellisense

The main purpose to introduce this feature is to improve the end user experience in writing the script in script editor window. You will experience a more easy and convenient way of writing scripts in script editor window for various classes like Profile, Parameter, Globals etc. So this will ultimately reduce the human error caused

during writing the scripts. Moreover, on hovering cursor over the functions/methods available in the list for the respective class, you will be able to view prompt help for the same.

**Let us understand this with the help of below given example:**

In the below given script, previously you had to write whole script manually with no list of functions/methods available for the respective class.

```
if (Parameter.Manager_Threshold == '15000')
{
PaperSave.ShowMessage("Approve","PaperSave");
}
else
{
PaperSave.ShowMessage("Reject",'PaperSave');
}
```

But with JavaScript Intellisense feature (as shown below), now as you will write the class name followed by dot (.), related functions/methods available for the respective class will be listed. You can also view the prompt help in the tool tip on hovering the cursor over the respective functions/methods as displayed in below screen.

Moreover, you will experience an autocomplete of Single Quotes, Double Quotes and Curly Braces while you press the respective keys in the script editor.

Below are the examples for all the classes that support JavaScript Intellisense:

1. Profile.: Profile.{ProfileFieldName, ContextParamerters}

As you write Profile. in the editor window, all the available Profile Fields will be listed in the drop-down as displayed in below screen.

**Note:** if the Workflow User Name exists in the format as Domain Name\User Name, then for PaperSave Web while using WF\_user Parameter in the script, you will have to write Workflow User Name as "Domain Name\\User Name. Following is the example:

**Profile.WF\_user"Soldev\\Administrator";**

## 2. **Parameter.:** Parameter.{WorkflowParameter}

As you write Parameter. in the editor window, all the configured Workflow Parameters for the respective Workflow will be listed in the drop-down as displayed in below screen.

## 3. **Globals.:**

As you write Globals. in the editor window, "**Add**" and "**getVal**" function will be listed in the drop-down as displayed in below screen.

## 4. **PaperSave.:** PaperSave.{Methods}

As you write PaperSave. in the editor window, all the available Methods will be listed in the drop-down as displayed in below screen.

**ExecuteSQLServerQuery** (Connection String, Command, ExecuteClientSide (optional), Data AccessServiceURL (Optional), UserName (Optional), Password (optional): There are six parameters of which Two are Required and other Four are Optional for this method as described below:

ConnectionString (Required):

It is recommended to write the ConnectionString in below mentioned format only. Please take a note that while writing the Connection String, it is highly recommended to use Windows Authentication mode only and NOT SQL Server Authentication Mode due to security reasons.

### **Connection String Recommended Format:**

1. Data Source= {Server Name};Initial Catalog= {DatabaseName};Integrated Security=True;MultipleActiveResultSets=True

#### **OR**

Data Source={Server Name};Initial Catalog={DatabaseName};User ID={SQL User Name};Password={SQL Password};MultipleActiveResultSets=True

2. Driver={SQL Server};Server=ServerName;Database=DatabaseName;Trusted\_Connection=yes

#### **OR**

Driver= {SQL Server};Server=ServerName;Database=DatabaseName; User Id=myUsername;Password=myPassword;

#### **OR**

Provider=SQLOLEDB;Server=ServerName;Database=DatabaseName;Trusted\_Connection=yes

#### **OR**

Provider=SQLOLEDB;Server=ServerName;Database=DatabaseName; User Id=myUsername;Password=myPassword;

2. Command (Required): This parameter allows you to write the query that has to be executed against the database of the given Connection String.

### **Possible Customizations:**

We don't support direct calling a stored procedure because a Stored Procedure can return multiple result sets and we do not have support for statements that return multiple result sets. If you desire this to be done, then you need to use the following strategy in the script you are using from within our javascript:

```
Declare @tablevar table(col1,..)

insert into @tablevar(col1,..) exec MyStoredProc 'param1', 'param2'

SELECT col1, col2 FROM @tablevar
```

Following example explains this more clearly:

**For Example:** Below is a sample Stored Procedure that returns the columns based on the parameter passed while executing stored procedures from java script.

```
SET ANSI_NULLS ON

GO

SET QUOTED_IDENTIFIER ON

GO

ALTER PROCEDURE testps

(@Id bigint)

AS
```

```
BEGIN
```

```
SET NOCOUNT ON;
```

```
select ID,ConfigName,ConfigValue from Config where ID = @Id;
```

```
RETURN
```

```
end
```

If you want to retrieve above three columns then you have to prepare query as below:

```
var con = "Driver=SQL Server;Server=hvtest3;Database=PaperSave;Uid=sa;Pwd=abc123$$$";
```

```
var query = "DECLARE @users1 TABLE (CID int,Cname varchar(500),CValue varchar(4000)) INSERT into @users1(CID,Cname,CValue) exec testps @Id='2' SELECT CID,Cname,CValue from @users1";
```

```
var result=PaperSave.ExecuteSQLServerQuery(con,query);
```

```
PaperSave.ShowMessage("ConfigName :- " + result[0].Cname);
```

3. ExecuteClientSide (Optional): This parameter accepts only Boolean value like True or False and it is relevant only in the case of Windows. By default the value for this parameter will be False and the script will be executed on Server side. For PaperSave Windows based applications, if the value is set to "True" then the script will be executed at Client side for client side events like Pre-script, Post-script, On-Exit etc. However, for Paper-Save Web based applications, the script will be executed always on server side.

**Note:** Please take a note that on Server side the query will be executed under the context of PaperSave Service Account User and not the local user account.

4. **DataAccessServiceURL** (Optional): This parameter can be used when PaperSave is hosted on Cloud and Host Application's Database is NOT directly accessible and also in a case when you want to access another remote database provided that user has installed Data Access Service in that environment. For this parameter, you will have to provide the Data Access Web Service URL.

5. **UserName** (Optional): Enter the User Name who has the necessary rights to execute the given query on Host or Non Host Application's Database. Please make sure that you enter the User Name in the format as `DomainName\UserName`.

6. **Password** (Optional): Enter the respective Password of the User.

**GetListofUsersInAGroup:** This function allows you to get the list of users in a group from the PaperSave Application Server's domain (On-Premise) or in a group of users setup within PaperSaveCloud. The resultset of users is returned as a JavaScript array. Here, you need to pass the `GroupName` as string within double quotes ("").

## 5. **ScriptResult:**

As you will write `ScriptResult` in the editor window, all the available Functions will be listed in the drop-down as displayed in below screen.

- **ScriptResult.CancelScript:** This function can be used in a Script to prohibit the Event from getting executed if it does match some condition. You need to pass the value for this function as either "True" or "False". If the

value for this function is "True" then in that case it will cancel the script from being executed. And if the value for this function is "False", then no action will be performed.

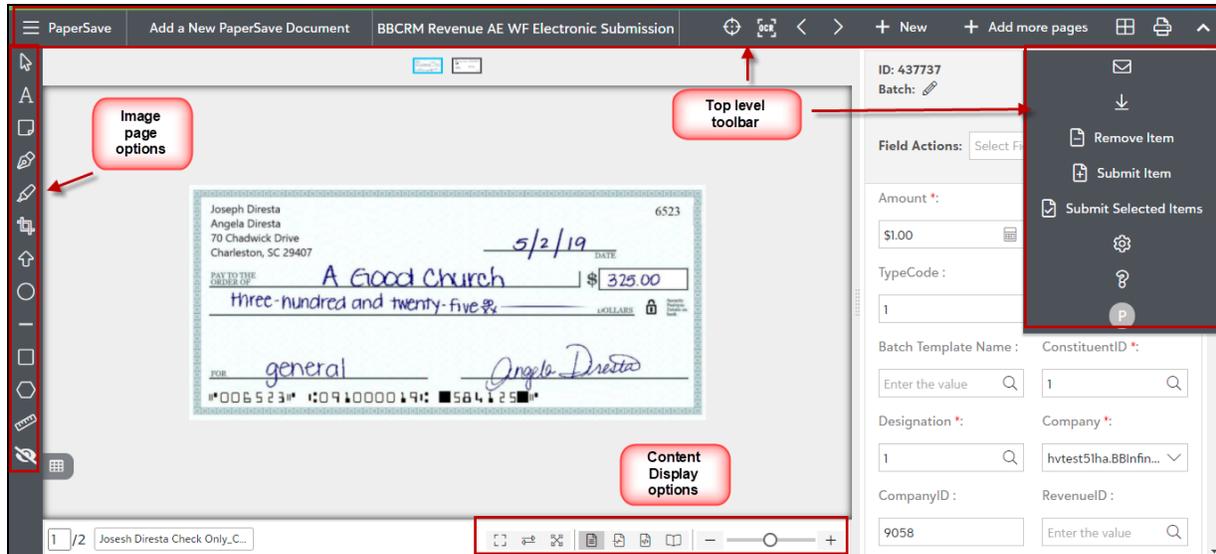
- **ScriptResult.ShowCancelMessage:** This function can be used to display a message box from the JavaScript execution. When the value of the ScriptResult.CancelScript is set to "True" in that case it will display a message box when cancelling the script, in case where the value of the ScriptResult.CancelScript is set to "**False**" then it will not display the said message box.

**Note:** Instead of using above two functions for executing Cancel Script, you have an ability to use a single method named 'PaperSave.CancelScript'.

## Validating the documents

Various operations can be performed on the documents in the Item viewer such as editing fields, adding annotations, define content display options, manage unsubmitted items in the Item Manipulation, etc.

The following screen displays the various options available in the Item viewer for validating the Workflow item.



The following is the description of various options available to validate the Workflow item in the Acquire Area:

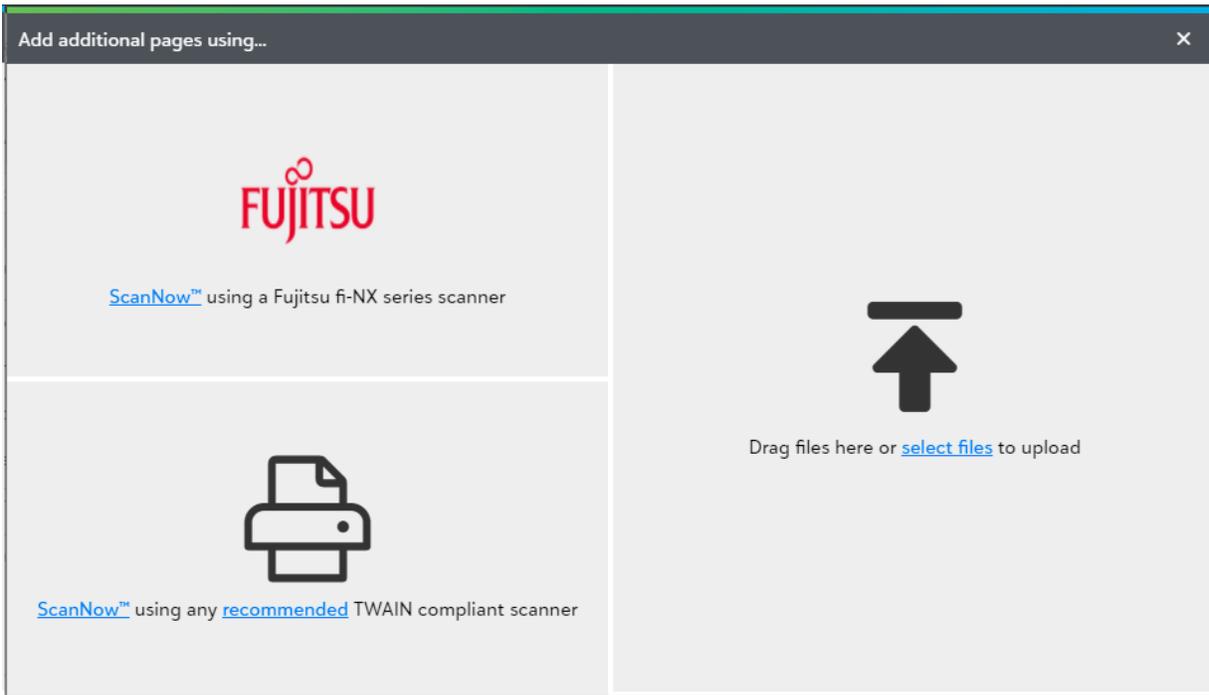
### Top level Toolbar options in the Item viewer for unsubmitted items:

Following are the options in the top level toolbar of item viewer for unsubmitted items:

-  - Use this option to Click or Drag the selected value from the Content to the Profile field. The default behavior for Click or Drag to capture can be defined from the Settings panel.
-  - Use this option to process OCR on the current document. Using this option will override the current values in the profile field panel.
-  - Click on this option to navigate to the previous unsubmitted item.
-  - Click on this option to navigate to the next unsubmitted item.
-  - Click on this option to switch to File capture options panel to acquire a new document.

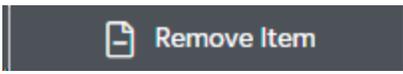
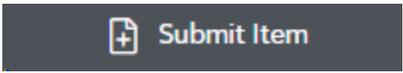
**+ Add more pages**

- Click on this option to add more pages to the current document. clicking on this option will display the following "Add additional pages" prompt.



- Click on this option to navigate to Page Manipulation View for unsubmitted items in the Acquire Area where you can perform various operations such as cut, copy, paste, rotate, etc. on the unsubmitted items.

The following [video](#) covers the Page manipulation view:

- 
-  - Click on this option to print the current document.
-  - Currently, this feature is not yet implemented.
-  - Click on this option to download the current document.
-  - Click on this option to discard the current item.
-  - Click on this option to submit the current unsubmitted item.

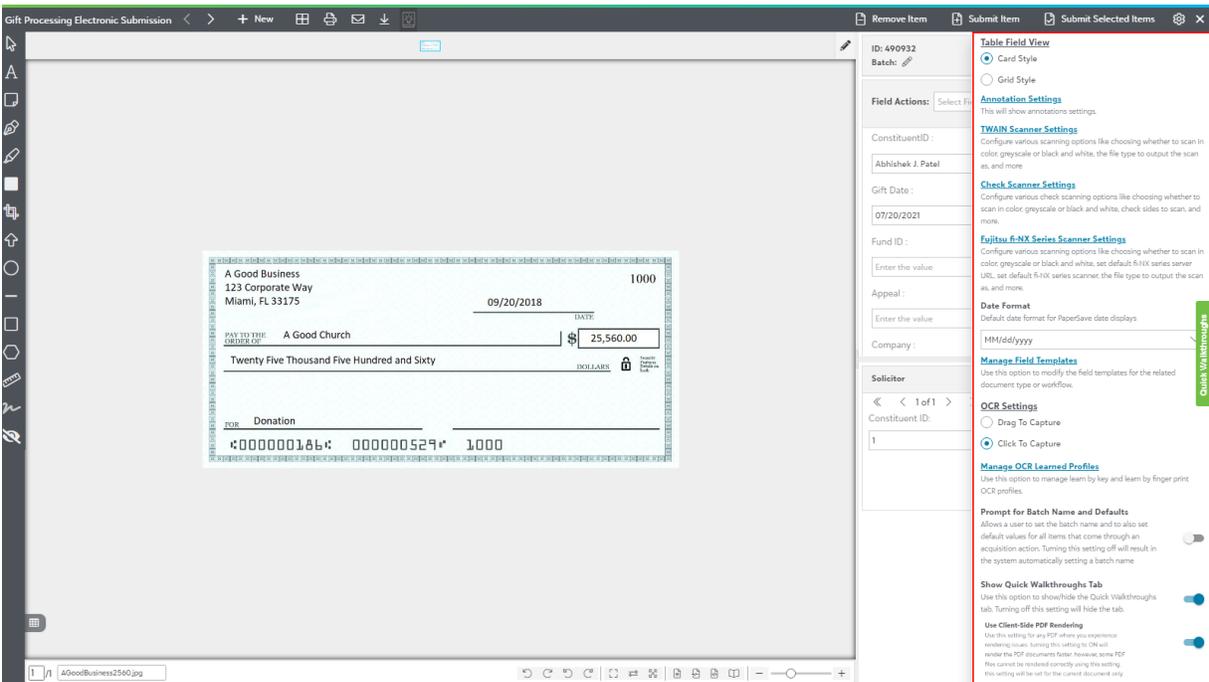


Submit Selected Items

- Click on this option to submit the selected items from the unsubmitted item list.



- Click on this option to define your preferences in the Settings panel in Item viewer for unsubmitted items as shown below:



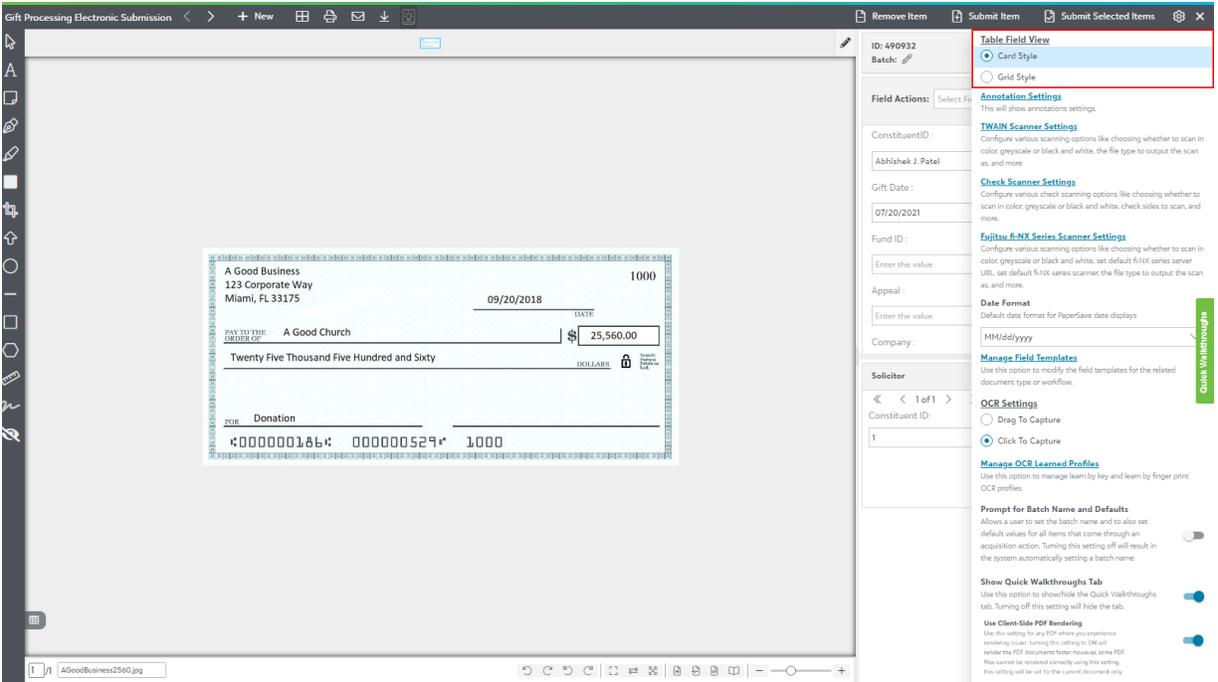
The following is the brief description of various preferences in the Settings panel:

## TABLE FIELD VIEW

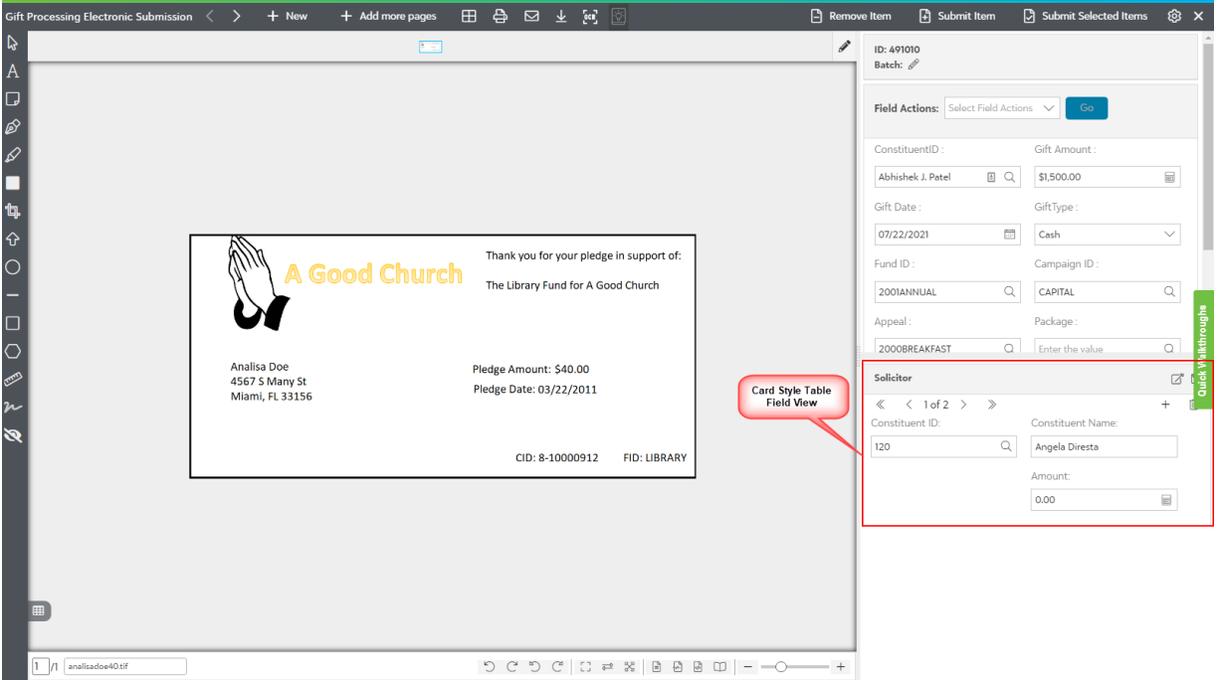
PaperSave offers a widget with two different user interfaces (card style and grid style) for the table type fields in the document profile field panel. Card style is set as default option.

**Card Style** : It switches the "table type field" widget to card view.

Select the Card style option in Table field view Settings as shown in below figure:

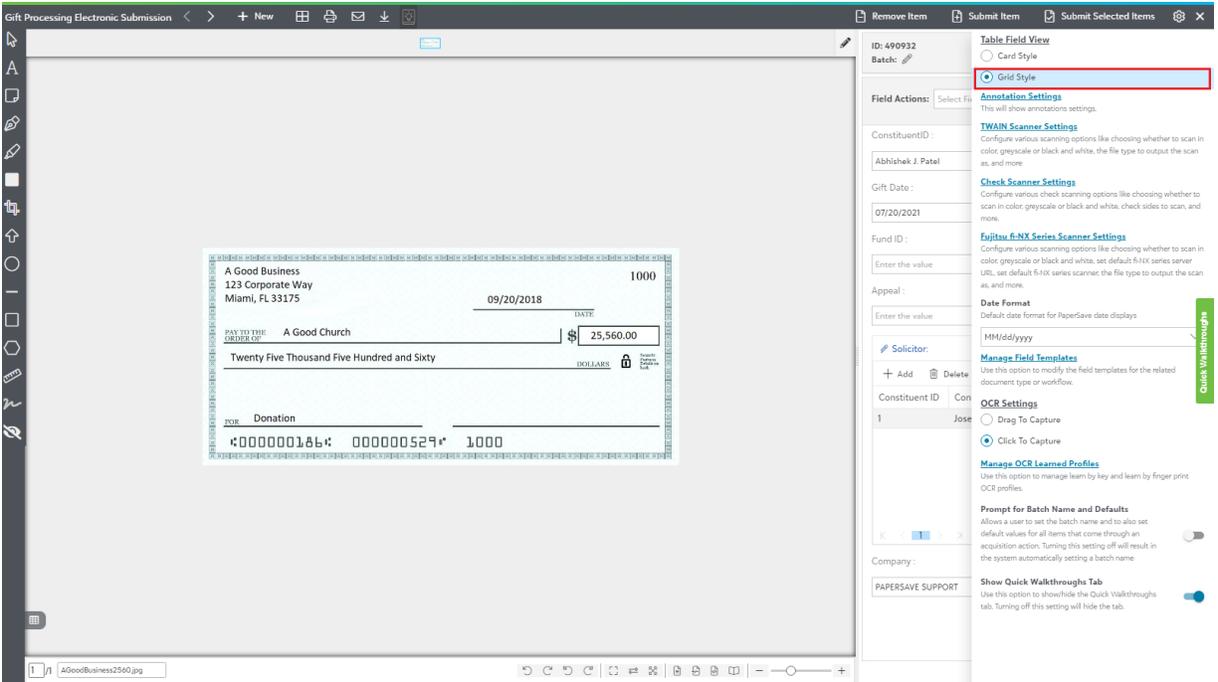


You will see "Card Style view" for the Table type fields in the document profile field panel as shown in the following screen.



**Grid Style:** It switches the "table type field" widget to Grid view.

Select the Grid style option in Table field view Settings as shown in following figure:



You will see "**Grid Style view**" for the Table type fields in the document profile field panel as shown in the following screen.

Gift Processing Electronic Submission

ID: 491010  
Batch:

Field Actions: Select Field Actions Go

ConstituentID: Abhishek J. Patel Gift Amount: \$1,500.00

Gift Date: 07/22/2021 Gift Type: Cash

Fund ID: 2001ANNUAL Campaign ID: CAPITAL

Appeal: 2000BREAKFAST Package: Enter the value

Solicitor:

Constituent ID	Constituent Name	Amount
120	Angela Diresta	0

1 of 1 pages (1 items)

Grid Style Table Field View

## ANNOTATION SETTINGS

This Setting option enables you to adjust the following preferences for each annotation tool in the Workflow Item Viewer.

## **Annotation Settings**

### **Text:**

Font: Calibri  10pt

Text:

Vertical: Top

Horizontal: Left

### **Note:**

Fill: 

Thickness:

Font: Calibri  10pt

Text:

Vertical: Top

Horizontal: Left

### **Pen:**

Thickness:

### **Circle:**

Fill: 

Thickness:

### **Line:**

Thickness:

### **Polygone:**

Fill: 

Thickness:

### **Rectangle:**

Fill: 

**Text, Note:** Select font, font size, default text, vertical and horizontal alignment.

**Pen, Circle, Line, Polygon, and Arrow:** Select the thickness and color.

**Highlighter:** Select the color.

## **TWAIN SCANNER SETTINGS**

This Setting option enables you to configure the following scanner related preferences as shown below:

[← Back To Settings](#)

### TWAIN Scanner Settings

Scan Type:	Black and White	▼
Page Sides to Scan:	Single Side(Simplex)	▼
DPI:	200	▼

#### Time in seconds before assuming scanning is complete

Use this to set time in seconds before PaperSave assumes it is no longer receiving pages from the scanner. Once this time has passed after receiving a page, then PaperSave will consider the scanning of a specific stack to be complete. Configure this to a higher number if the speed of your scanner and or internet connection heavily fluctuates. Be advised that the longer you set this time to be, the slower scanning will feel.

3	▼ ▲
---	-----

#### Show TWAIN driver settings before scanning

Turning this on will prompt users with the native TWAIN settings panel of the scanner they are using. This will allow them to control scanner specific settings prior to scanning.

#### Use a default scanner

Setting this off will clear the default scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

#### Prompt to continue scanning

When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

## 1) Scan Type

Black & White, Gray Scale, Color

**Tip:** We highly recommend you to use **Black and White** scan option as it uses the least amount of disk storage space and yields fastest processing.

## 2) Page Sides to Scan

- Single Side
- Both sides

**Note:** If your scanner supports skipping or ignoring blank page, then we recommend you setting the Page Scan options to Scan **Both sides**(Duplex).

## 3) DPI ( Dots per inch)

The smaller the DPI number, the less sharp the image will appear. However, size of the image will increase as you increase the DPI number.

**Note:** We recommend that you use 300 DPI.

## 4) Show TWAIN driver settings before scanning

Turning this on will prompt users with the native TWAIN settings panel of the scanner they are using. This will allow them to control scanner specific settings prior to scanning.

## 5) Use a default scanner

Setting this off will clear the default scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

# CHECK SCANNER SETTINGS

This Setting option enables you to configure the following check scanner related preferences as shown below:

### Check Scanner Settings

Scan Type:

Page Sides to Scan:

Double Feed Detection:

Prompt to continue scanning   
When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

Enable Rear Endorser:

Endorsement type\*:

Endorsement Line 1\*:

Endorsement Line 2:

Endorsement Line 3:

Endorsement Line 4:

Endorsement Line 5:

## 1) Scan Type

Black & White, Gray Scale, Color

**Tip:** We highly recommend you to use Black and White scan option as it uses the least amount of disk storage space and yields fastest processing.

## 2) Page Sides to Scan

- Single Side (Simplex)
- Both Sides

**Note:** We recommend you setting the Page Scan Options to Scan Both Sides (Duplex) if your scanner supports skipping or ignoring blank page.

## 3) Enable Rear Endorser :

This option allows the user to enable and disable the rear endorsement for the checks. Endorsement can be virtual or physical depending on your check scanner.

## 4) Endorsement Type:

This option will define if the rear endorsement is printed on the physical check or on the image of the check in the gift item document. You can select one or both options.

## Endorsement Line 1 to Endorsement line 5:

This sets the lines you want printing (virtually or physically) on the back of checks. This requires on the Enable Rear Endorser option to be turned on.

**Note:** Your check scanner must support this feature for using Rear endorser options for using Rear endorser options,

## FUJITSU FI- NX SERIES SCANNER SETTINGS

This Setting option enables you to configure the following Fujitsu fi-NX scanner related preferences as shown below:

### Fujitsu fi-NX Series Scanner Settings

Scan Type:	Black and White	▼
Page Sides to Scan:	Single Side(Simplex)	▼
Use a default fi-NX scanner	<input type="checkbox"/>	
Setting this off will clear the default fi-NX scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.		
Prompt to continue scanning	<input checked="" type="checkbox"/>	
When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.		

### 1) Scan Type

Black & White, Gray Scale, Color

**Tip:** We highly recommend you to use **Black and White** scan option as it uses the least amount of disk storage space and yields fastest processing.

### 2) Page Sides to Scan

- Single Side
- Both sides

**Note:** If your scanner supports skipping or ignoring blank page, then we recommend you setting the page scan options to scan both sides (Duplex).

### 3) Output Type:

This controls the format of documents that go through the Fujitsu NX series scanner based acquisition option.

### 4) Use a default fi-NX scanner

Setting this off will clear the default fi-NX scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

## USE THE NEW ACQUIRE APP BY DEFAULT

Turning this on will automatically redirect users who open the PaperSave Scan windows app in PaperSave 6 to the new desktop web workflow item Acquisition user experience.

## DATE FORMAT

This option enables the user to change the date format. By default it is MM/dd/yyyy.

User can set their preferences to any of the following date format options.

- MM-dd-yyyy
- MM/dd/yyyy
- dd-MM-yyyy

- dd/MM/yyyy
- yyyy-MM-dd

Once any of the above date format is selected, it should save/update the new date format for that user on exiting of the Settings menu.

### **OCR SETTINGS:**

This Setting option enables you to configure OCR related preferences in the Workflow item viewer as follows. Set the preference to use drag or click action for correcting the Profile fields upon OCR processing.

**1) Drag to Capture:** Choose this option to capture the value from the document and drag that selected value to desired document profile field.

**2) Click to Capture:** Choose this option to capture the value from the document and click on the desired document profile field to auto-fill the captured value.

**Note:** Click/Drag to Capture options will be only applicable for OCR related documents.

### **Manage OCR Learned Profiles**

Use this option to manage learn by key and learn by finger print OCR profiles.

### **PROMPTS FOR BATCH NAME AND DEFAULTS**

Enabling this option turns on the prompt for batch and field defaults. The prompt is on by default but can be turned off by selecting the checkbox labeled "**Don't ask me again**" in the "**Set Batch and Field Defaults**" dialog. Turning this setting off will result in the system automatically setting a batch name. Similarly, Setting the option **ON** restores the prompt.

## **SHOW/HIDE QUICK WALKTHROUGHS TAB**

Use the toggle button to show/hide Quick walkthrough tab on the screen.

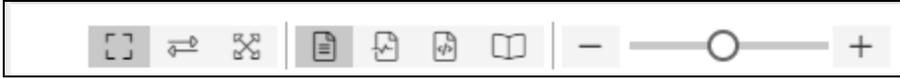
## **Using Image page options(Annotations) for Unsubmitted items**

You can add different annotations using the Image page options toolbar on the left hand corner of the screen:

The following [video](#) explains the how to use Image Page options for Unsubmitted items in the Acquire Area.

## **Content Display options in the Item viewer**

The following screen displays the various Content Display options in the Item Viewer to define your display related preferences. Click [here](#) to know more about Content Display options in detail.



The following [video](#) covers the Content Display options in the Item Viewer in the Acquire Area:

## Review and edit Profile fields

The area presents the field panel in right corner of the item viewer with various fields related to document type or Workflows. The field data is either automatically captured via Optical Character Recognition (OCR) technology, looked up against values in integrated app's database (using SQL or Web API) or entered in manually. Fields that are captured via OCR will show a percentage value in parentheses next to the field label. This

percentage represents the confidence that the OCR engine has in the value it captured. The more exact the match, the higher the confidence score.

It is recommended that you double check and validate all values captured by OCR but you should especially focus to validate all the values with a low confidence score. If the auto field values are incorrect or inaccurate, then you can edit such profile fields manually or use the drag to capture tool to automatically select text from the document, drag, and then drop it on the field. See the [drag to capture](#) section for more details on how this works.

The fields will vary across different Workflows and document type defined in the Configuration Area. For Example - A date field value will have a date picker widget to enter the date value. It can be modified manually such as in cases where the OCR may not have captured the right date. The area will display a confidence score next to the date field's label indicating how accurate it believes the OCR engine was in capturing the date off the document.

Similarly, based on the Workflow fields properties, some fields such as vendor, constituent, etc. can be looked up against the integrated app's database using different properties. For amount related fields such as Invoice amount, you can optionally use the calculator widget to perform desired calculations and determine the amount. The value of this field is defaulted to the amount captured by OCR in case if the document went through OCR processing successfully.

You can default the view as Card style view or Grid style view in Table Type fields such as Line items, distribution, Gift Splits etc. This preference can be defined in the settings panel.

**Note:** The fields in the Workflow item field panel may vary based on the user's access rights across different Workflows.

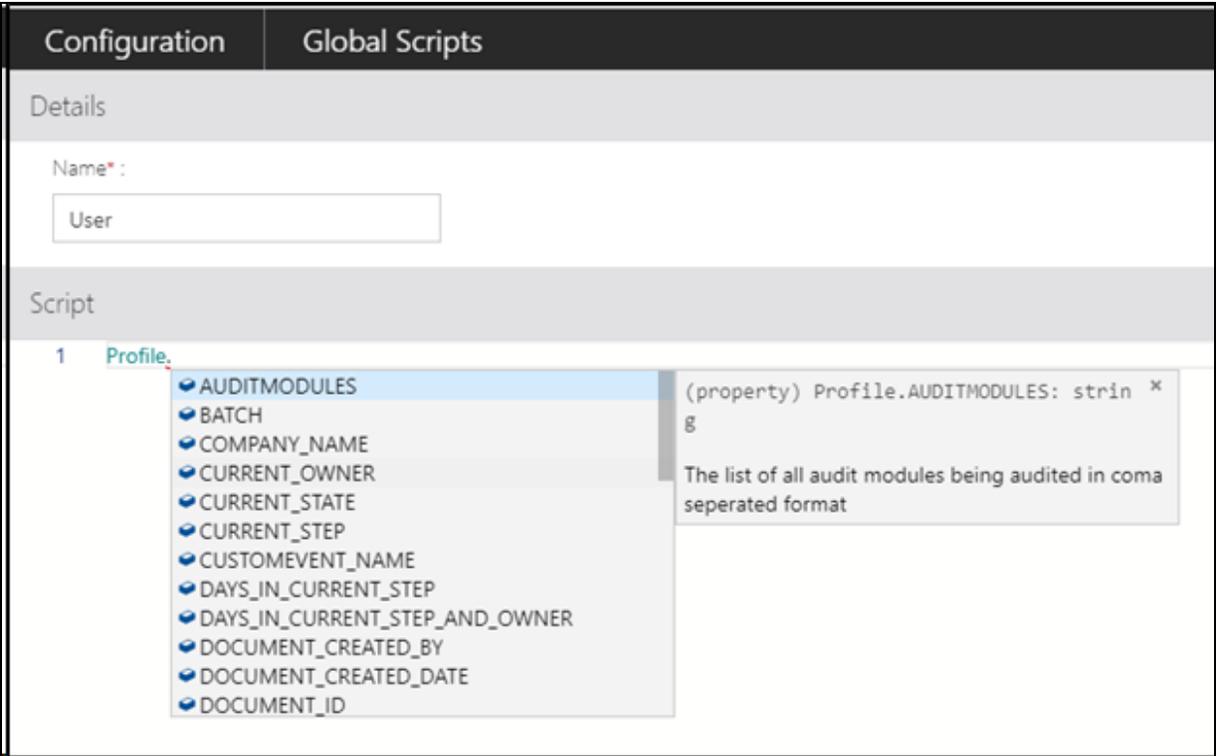
## Correcting fields using Drag to Capture tool

The Drag to Capture tool allows you to hover over a word, grab onto it, and drag it over a field and let go to drop that word into the field. You can also rubber band (which draws a highlighted area around the selected text) multiple words, grab onto them, and drag them over a field to drop all those words into the field. This is a very useful tool to validate and correct values that were not captured correctly by OCR or to help make manual entry more efficient.

**Note:** This option is only applicable for document or item that went through the OCR process successfully.

## Intellisense variables for Global scripts

PaperSave Intellisense enhances the user experience in writing the scripts in Global script editor window. As you write the class name (such as profile, parameter, PaperSave, Globals, etc.) followed by dot(.), then a list of related functions/methods available for the respective class will be suggested. Also, you can view the prompt help in the tooltip on hovering the cursor over the respective functions/methods as displayed in the below screen:



Following are the different PaperSave variables that can be used while writing Global script in the script editor window:

Global Script Variable Name	Description
Profile.AUDITMODULES	It fetches a list of all modules being audited in comma separated format.
Profile.BATCH	It fetches the batch name of the current Workflow item.
Profile.COMPANY_NAME	It fetches the Integrated app instance of the current document.
Profile.CURRENT_OWNER	It fetches the owner of the current Workflow item in DOMAIN\USERNAME format.
Profile.CURRENT_STATE	It fetches the current state of the Workflow item.
Profile.CUSTOMEVENT_NAME	It fetches the customevent branch name to be used in the pre-script only.

Profile.DAYS_IN_CURRENT_STEP	It fetches the number of days the Workflow Item is in the Current Step.
Profile.DAYS_IN_CURRENT_STEP_AND_OWNER	It fetches the number of days the Workflow Item is in the Current Step or with the Current Owner.
Profile.DOCUMENT_CREATED_BY	It fetches the user who created current document (specific to Workflow Forms).
Profile.DOCUMENT_CREATED_DATE	It fetches the current document's creation date.
Profile.DOCUMENT_ID	It fetches the identification number for the current document.
Profile.DOCUMENT_TYPE	It fetches the document type for the current document.
Profile.DROPPPOINT_ID	It fetches the Drop point ID for current Workflow item.
Profile.DROPPPOINT_NAME	It fetches the Drop point name for the current Workflow item.
Profile.FROMEMAIL	It fetches the FROM EMAIL configured for SMTP.
Profile.HAS_BEEN_ASSOCIATED	It fetches the result whether current workflow item has been associated to an integrated app record. (case sensitive)
Profile.HOSTAPPLICATION	It fetches the Integrated application name of the current document.
Profile.IS_ASSOCIATED	It fetches the result whether the current workflow item is associated to an integrated app record. (case insensitive).
Profile.MIME_TYPE	It fetches the multipurpose internet mail extensions format of the current document.
Profile.MODULE	It fetches the Module of the current document.
Profile.PAPERSAVE_CONNECTION_STRING	It fetches the PaperSave Connection String for database.
Profile.PARENTID	It fetches the Parent host record identification key for the associated document.
Profile.QUEUEITEM_FILENAME	It fetches the file name of the current Workflow item.
Profile.QUEUEITEM_ID	It fetches the identification number of current Workflow item.
Profile.TRANSACTION_TYPE	It fetches the transaction type of the current document.
Profile.USER	It fetches the current user's username.
Profile.USERS_GROUP	It fetches the User Group for the current user.
Profile.WORKFLOWITEM_FILENAME	It fetches the file name of the current Workflow item.

Profile.WORKFLOWITEM_ID	It fetches the identification number of the current Workflow item.
Profile.WORKFLOW_ID	It fetches the identification number of the Workflow for current Workflow item.
Profile.WORKFLOW_NAME	It fetches the name of the workflow for the current document.
Profile.FieldName.Redact	It redacts the entered Workflow Field in the current Workflow item.
PaperSave.Blackbaud	It invokes Blackbaud API methods.
PaperSave.BlackbaudSky	It invokes Blackbaud API methods.
PaperSave.CancelScript	It cancels the event from being sent to the server during a Pre-Event Script (PreScript) being executed on an event.
PaperSave.Context	It fetches the result whether the current script is being executed within Web or Windows.
PaperSave.Dynamics365	It invokes Dynamics 365 WebAPI methods.
PaperSave.DynamicsCRM	It invokes Dynamics CRM WebAPI methods.
PaperSave.ExecuteSQLServerQuery	It executes a SQL statement against a database. If the statement is a select statement, then it will return the resultset of statement as a Javascript Array that can be accessed using the following syntax to return a single column value for a specific row.  <a href="#">ResultVariable[RowIndex].ColumnName</a>
PaperSave.GetListOfUsersInAGroup	It fetches the list of users in a group from the PaperSave Application Server's domain (On-Premise) or in a group of users set up within PaperSaveCloud. The resultset of users is returned as a Javascript array.
PaperSave.IncludeScript	It includes a desired script from the existing list of Global scripts.
PaperSave.Intacct	It invokes Intacct WebAPI methods.
PaperSave.IsWeb	It detects whether the script is being executed from within a web client. Returns true or false.
PaperSave.IsWindows	It detects whether the script is being executed from within a windows client. Returns true or false.
PaperSave.RedactDocument	It detects whether document for given page number is available or not.

	Returns true or false.
PaperSave.ShowMessage	It shows a message to the user.
PaperSave.User	It fetches the values of the current user such as Display name, login name, email, tags, and groups.
PaperSave.getVal	It fetches the value of Global variables by name.
PaperSave.BlackbaudSky.CallSkyAPI	It fetches the records from Blackbaud using SKY API.
PaperSave.Blackbaud.GetRecords	It fetches the records from Blackbaud.
Globals.getval	It sets the value of a Globals variable by name or adds a new Variable to the Globals variable collection.
Globals.add	It sets the value of a Globals variable by name or adds a new Variable to the Globals variable collection.
Parameter.<Workflow_Parameter_Name>	It includes any of the existing Workflow Parameter in the global script.

## View documents for PaperSave

All the records in the integrated application will have documents associated with them. The following snap shows the documents associated with the Integrated application:

You can click on a document to open in a document viewer as shown below. You can annotate the document if necessary and can edit the profile fields, and print, download a copy and share a copy.

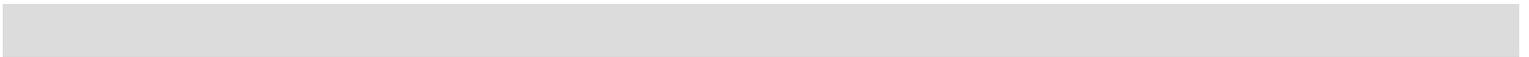
Click [here](#) to explore more about item viewer.

## MASS UPDATE FIELDS

### Quick Search

Quick Search enables you to promptly find an item by using relevant keyword(s) instead of browsing and scrolling across multiple items within the list.

It searches the items across all the columns in the item list based on the search criteria (keyword). See the Quick search as shown in the following figure:



- For Example – Let's say you need to search the items containing the digits '1625'. Enter the digits "1625" in the Quick Search bar to find the relevant items.

- It shall display the list of all the relevant items containing the digits "1625" as shown below.

**Note:** Quick Search mechanism is case insensitive and also supports various special characters in the search criteria.

PaperSave supports the following special characters:

**Supported Special characters:**

o ~ ` ! @ # \$ % ^ & \* ( ) \_ - + = { } | [ ] \ ; : " ' < > ? , . /

**Supported Spanish characters:**

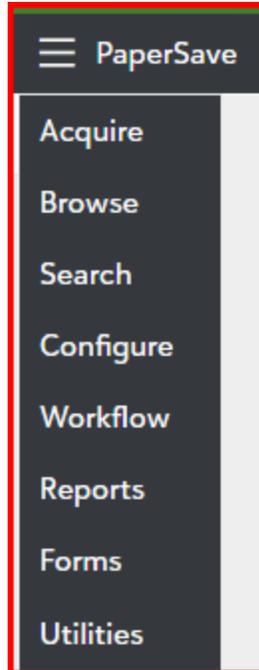
o á, é, í, ó, ú, ñ, ü, ç, j

**Supported French characters:**

o ë, ï, ü, à, è, ù, â, ê, î, ô, û, é, Ç

## Navigation menu

You can navigate to different PaperSave areas such as Acquire, Browse, Search, Configure, Reports, Forms, and Utilities. Click on the  icon in top-left corner of the screen, and select the PaperSave Area that you intend to access as shown below:



## Using image annotation options

Annotations are accessible from within the Image page options toolbar to the left of the item viewer's content panel as shown below.

**Warning:** Image annotation options panel will not appear for the files with **office** (.doc, .docx, .xls, .xlsx, .ppt, .pptx) and **email** (.msg and .eml) extensions.

**Note:** These options will remain disabled when a current user does not have rights to add/edit the annotations on the file in content viewer.

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 Globeland 1001

SHIP TO: Mr. Christopher Jones  
 254 East Road  
 Globecity East  
 Globeland 1001

(SAME AS SOLD TO UNLESS OTHERWISE INDICATED)

OUR ORDER	YOUR ORDER No	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652
QUANTITY	SHIP	PART or MODEL NUMBER	DESCRIPTION	TAX	LIST PRICE	NET UNIT PRICE	AMOUNT
10	10	APIAPT103	Bamboo Blinds		1020.00	1020.00	10200.00
50	50	APIAT1C38	Writing Sets		200.50	200.50	10025.00
80	80	APIAT1C39	Umbrellas		30.00	30.00	2400.00
8	8	APIAT1C72	Cane Chair		693.20	693.20	5545.60
6	6	APIAT1C78	Cane Baskets		50.00	50.00	300.00
4	4	APIAPT103	Tea Chests		799.00	799.00	3196.00
2	2	APIAT1C38	Writing Desk		2600.00	2600.00	5200.00
100	100	APIAT1C39	Oriental Rug		65.00	65.00	6500.00
12	12	APIAT1C72	Chinese Wall Hangings		193.00	193.00	2316.00
5	5	APIAT1C78	Chinese Screen		2002.00	2002.00	10010.00

invoice.pdf

Watch the [video](#) to learn about the various options in the Image page options toolbar.

The following is a description of each annotation in the Image page options toolbar:

**MOUSE POINTER**: This pointer  enables you to select annotations on pages so that you can move them or delete them.

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 Fax : (01) 9999 8888

**SOLD TO:**  
 Mr. Graham H. Smith  
 12 South Road  
 Globecity East  
 Globeland 1001

**SHIP TO:**  
 Mr. Christopher Jones  
 254 East Road  
 Globecity East  
 Globeland 1001

(SAME AS SOLD TO UNLESS OTHERWISE INDICATED)

OUR ORDER	YOUR ORDER No	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652
QUANTITY ORD.	SHIP	PART or MODEL NUMBER	DESCRIPTION	TAX	LIST PRICE	NET UNIT PRICE	AMOUNT
10	10	APIAPT103	Bamboo Blinds		1020.00	1020.00	10200.00
50	50	APIAT1C38	Writing Sets		200.50	200.50	10025.00
80	80	APIAT1C39	Umbrellas		30.00	30.00	2400.00
8	8	APIAT1C72	Cane Chair		693.20	693.20	5545.60
6	6	APIAT1C78	Cane Baskets		50.00	50.00	300.00
4	4	APIAPT103	Tea Chests		799.00	799.00	3196.00
2	2	APIAT1C38	Writing Desk		2600.00	2600.00	5200.00
100	100	APIAT1C39	Oriental Rug		65.00	65.00	6500.00
12	12	APIAT1C72	Chinese Wall Hangings		193.00	193.00	2316.00
5	5	APIAT1C78	Chinese Screen		2002.00	2002.00	10010.00

1 / invoice.pdf

**Text:** This option  enables you to add text right onto a page on the current document.

**New World Company**  
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 G.P.O. Box 100, Globecity Globeland, 1000  
 Telephone: (01) 9999 9999  
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OUR ORDER	YOUR ORDER No	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652
QUANTITY ORD.	SHIP	PART or MODEL NUMBER	DESCRIPTION	TAX	LIST PRICE	NET UNIT PRICE	AMOUNT
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80	80	APIAT1C39	Umbrellas		30.00	30.00	2400.00
8	8	APIAT1C72	Cane Chair		693.20	693.20	5545.60
6	6	APIAT1C78	Cane Baskets		50.00	50.00	300.00
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2	2	APIAT1C38	Writing Desk		2600.00	2600.00	5200.00
100	100	APIAT1C39	Oriental Rug		65.00	65.00	6500.00

**Note:** This option  enables you to add a sticky note to the current document.

Select this option and click on the desired location on the document where you want to add a Note and the Add Note annotation box will be displayed. Here, you can select the icon from the list and add the note in the Contents box.

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OUR ORDER	YOUR ORDER No	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652
QUANTITY ORD.	SHIP	PART or MODEL NUMBER	DESCRIPTION	TAX	LIST PRICE	NET UNIT PRICE	AMOUNT
10	10	APIAPT103	Bamboo Blinds		1020.00	1020.00	10200.00
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8	8	APIAT1C72	Cane Chair		693.20	693.20	5545.60
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4	4	APIAPT103	Tea Chests		799.00	799.00	3196.00
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100	100	APIAT1C39	Oriental Rug		65.00	65.00	6500.00
12	12	APIAT1C72	Chinese Wall Hangings		193.00	193.00	2316.00
5	5	APIAT1C78	Chinese Screens		2002.00	2002.00	10010.00

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**Pen:** This tool  is used to draw on document pages.

**Pen**

**New World Company**  
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OUR ORDER	YOUR ORDER No	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652
QUANTITY ORD.	SHIP	PART or MODEL NUMBER	DESCRIPTION	TAX	LIST PRICE	NET UNIT PRICE	AMOUNT
10	10	APIAPT103	Bamboo Blinds		1020.00	1020.00	10200.00
50	50	APIAT1C38	Writing Sets		200.50	200.50	10025.00
80	80	APIAT1C39	Umbrellas		30.00	30.00	2400.00
8	8	APIAT1C72	Cane Chair		693.20	693.20	5545.60
6	6	APIAT1C78	Cane Baskets		50.00	50.00	300.00
4	4	APIAPT103	Tea Chests		799.00	799.00	3196.00
2	2	APIAT1C38	Writing Desk		2600.00	2600.00	5200.00

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**Highlight:** This option  is used to highlight a desired area of the current document.

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 Globecity East  
 Globeland 1001

(SAME AS SOLD TO UNLESS OTHERWISE INDICATED)  
**SHIP TO:**  
 Mr. Christopher Jones  
 254 East Road  
 Globecity East  
 Globeland 1001

OUR ORDER	YOUR ORDER No	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652
QUANTITY ORD.	SHIP	PART or MODEL NUMBER	DESCRIPTION	LIST PRICE	NET UNIT PRICE	AMOUNT	
10	10	APIAPT103	Bamboo Blinds	1020.00	1020.00	10200.00	
50	50	APIAT1C38	Writing Sets	200.50	200.50	10025.00	
80	80	APIAT1C39	Umbrellas	30.00	30.00	2400.00	
8	8	APIAT1C72	Cane Chair	693.20	693.20	5545.60	
6	6	APIAT1C78	Cane Baskets	50.00	50.00	300.00	
4	4	APIAPT103	Tea Chests	799.00	799.00	3196.00	
2	2	APIAT1C38	Writing Desk	2600.00	2600.00	5200.00	

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**Crop:** This tool is used to remove unwanted outer areas from the current item.

You will need to confirm the crop operation once the area is selected by clicking on the "**Click here**" link as shown in the above figure to save the crop page.

**Arrow:** This tool  is used to draw an arrow line on the current document.

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 Fax : (01) 9999 8888

**SOLD TO:**  
 Mr. Graham H. Smith  
 2 South Road  
 Globecity East  
 Globeland 1001

(SAME AS SOLD TO UNLESS OTHERWISE INDICATED)

**SHIP TO:**  
 Mr. Christopher Jones  
 254 East Road  
 Globecity East  
 Globeland 1001

OUR ORDER	YOUR ORDER No	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652
QUANTITY ORD.	SHIP	PART or MODEL NUMBER	DESCRIPTION	TAX	LIST PRICE	NET UNIT PRICE	AMOUNT
10	10	APIAPT103	Bamboo Blinds		1020.00	1020.00	10200.00
50	50	APIAT1C38	Writing Sets		200.50	200.50	10025.00
80	80	APIAT1C39	Umbrellas		30.00	30.00	2400.00
8	8	APIAT1C72	Cane Chair		693.20	693.20	5545.60
6	6	APIAT1C78	Cane Baskets		50.00	50.00	300.00
4	4	APIAPT103	Tea Chests		799.00	799.00	3196.00
2	2	APIAT1C38	Writing Desk		2600.00	2600.00	5200.00

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**Ellipse:** This tool  is used to draw an ellipse on the current document.

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 Globecity East  
 Globeland 1001

OUR ORDER	YOUR ORDER No	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652

QUANTITY ORD.	SHIP	PART or MODEL NUMBER	DESCRIPTION	TAX	LIST PRICE	NET UNIT PRICE	AMOUNT
10	10	APIAPT103	Bamboo Blinds		1020.00	1020.00	10200.00
50	50	APIAT1C38	Writing Sets		200.50	200.50	10025.00
80	80	APIAT1C39	Umbrellas		30.00	30.00	2400.00
8	8	APIAT1C72	Cane Chair		693.20	693.20	5545.60
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4	4	APIAPT103	Tea Chests		799.00	799.00	3196.00
2	2	APIAT1C38	Writing Desk		2600.00	2600.00	5200.00

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**Line:** This tool  is used to draw a line on the current document.

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 Globeland 1001

OUR ORDER	YOUR ORDER No	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652
QUANTITY ORD.	SHIP	PART or MODEL NUMBER	DESCRIPTION	TAX	LIST PRICE	NET UNIT PRICE	AMOUNT
10	10	APIAPT103	Bamboo Blinds		1020.00	1020.00	10200.00
50	50	APIAT1C38	Writing Sets		200.50	200.50	10025.00
80	80	APIAT1C39	Umbrellas		30.00	30.00	2400.00
8	8	APIAT1C72	Cane Chair		693.20	693.20	5545.60
6	6	APIAT1C78	Cane Baskets		50.00	50.00	300.00
4	4	APIAPT103	Tea Chests		799.00	799.00	3196.00
2	2	APIAT1C38	Writing Desk		2600.00	2600.00	5200.00

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**Rectangle:** This tool  is used to draw a rectangle on the current document.

**New World Company**  
 Floor 100, 100 Main Street  
 G.P.O. Box 100, Globecity Globeland, 1000  
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 Fax : (01) 9999 8888

SHIP TO: (SAME AS SOLD TO UNLESS OTHERWISE INDICATED)  
 Mr. Christopher Jones  
 254 East Road  
 Globecity East  
 Globeland 1001

OUR ORDER	YOUR ORDER No	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652
QUANTITY ORD.	SHIP	PART or MODEL NUMBER	DESCRIPTION	TAX	LIST PRICE	NET UNIT PRICE	AMOUNT
10	10	APIAPT103	Bamboo Blinds		1020.00	1020.00	10200.00
50	50	APIAT1C38	Writing Sets		200.50	200.50	10025.00
80	80	APIAT1C39	Umbrellas		30.00	30.00	2400.00
8	8	APIAT1C72	Cane Chair		693.20	693.20	5545.60
6	6	APIAT1C78	Cane Baskets		50.00	50.00	300.00
4	4	APIAPT103	Tea Chests		799.00	799.00	3196.00
2	2	APIAT1C38	Writing Desk		2600.00	2600.00	5200.00

**Polygon:** This tool  is used to draw a polygon on the current document.

**New World Company**  
 Floor 100, 100 Main Street  
 G.P.O. Box 100, Globecity Globeland, 1000  
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 Globecity East  
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**SHIP TO:**  
 Mr. Christopher Jones  
 254 East Road  
 Globecity East  
 Globeland 1001

OUR ORDER	YOUR ORDER No	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	06/50-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652

QUANTITY ORD.	SHIP	PART or MODEL NUMBER	DESCRIPTION	TAX	LIST PRICE	NET UNIT PRICE	AMOUNT
10	10	APIAPT103	Bamboo Blinds		1020.00	1020.00	10200.00
50	50	APIAT1C38	Writing Sets		200.50	200.50	10025.00
80	80	APIAT1C39	Umbrellas		30.00	30.00	2400.00
8	8	APIAT1C72	Cane Chair		693.20	693.20	5545.60
6	6	APIAT1C78	Cane Baskets		50.00	50.00	300.00
4	4	APIAPT103	Tea Chests		799.00	799.00	3196.00
2	2	APIAT1C38	Writing Desk		2600.00	2600.00	5200.00

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**Ruler:** This tool  is used to measure the actual length of a part of the page of the current document.

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127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652

QUANTITY ORD.	SHIP	PART or MODEL NUMBER	DESCRIPTION	TAX	LIST PRICE	NET UNIT PRICE	AMOUNT
10	10	APIAPT103	Bamboo Blinds		1020.00	1020.00	10200.00
50	50	APIAT1C38	Writing Sets		200.50	200.50	10025.00
80	80	APIAT1C39	Umbrellas		30.00	30.00	2400.00
8	8	APIAT1C72	Cane Chair		693.20	693.20	5545.60
6	6	APIAT1C78	Cane Baskets		50.00	50.00	300.00
4	4	APIAPT103	Tea Chests		799.00	799.00	3196.00
2	2	APIAT1C38	Writing Desk		2600.00	2600.00	5200.00
100	100	APIAT1C39	Oriental Rug		65.00	65.00	6500.00
12	12	APIAT1C72	Chinese Wall Hangings		193.00	193.00	2316.00
5	5	APIAT1C78	Chinese Screens		2002.00	2002.00	10010.00

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**Redaction:** This tool is used to black out sensitive information in order to remove it permanently from a document page.

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 Fax : (01) 9999 8888

(SAME AS SOLD TO UNLESS OTHERWISE INDICATED)

SOLD TO:  
 [Redacted]

SHIP TO:  
 Mr. Christopher Jones  
 254 East Road  
 Globecity East  
 Globeland 1001

ORDER	YOUR ORDER No	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.	
[Redacted]	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652	
QUANTITY	ORD.	SHIP	PART or MODEL NUMBER	DESCRIPTION	TAX	LIST PRICE	NET UNIT PRICE	AMOUNT
10	10		APIAPT103	Bamboo Blinds		1020.00	1020.00	10200.00
50	50		APIAT1C38	Writing Sets		200.50	200.50	10025.00
80	80		APIAT1C39	Umbrellas		30.00	30.00	2400.00
8	8		APIAT1C72	Cane Chair		693.20	693.20	5545.60
6	6		APIAT1C78	Cane Baskets		50.00	50.00	300.00
4	4		APIAPT103	Tea Chests		799.00	799.00	3196.00
2	2		APIAT1C38	Writing Desk		2600.00	2600.00	5200.00

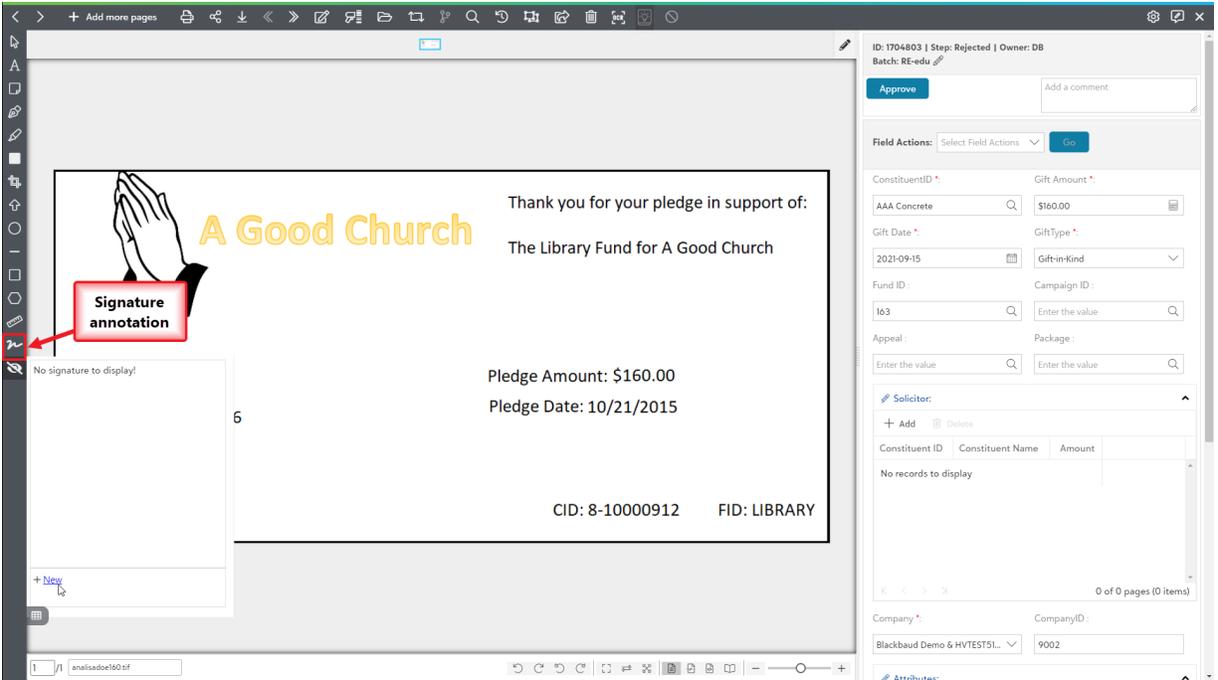
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Close the document or [click here](#) to save the redaction.

You will need to confirm the redaction once it has been applied by clicking on the "**Click here**" link as shown in the above figure to save the redaction changes.

**Warning:** Redactions cannot be undone once they are saved and committed.

**Signature:** This tool is used to add signature on the document as an image or by drawing it.



- When you click on it, a dialog box appears as shown below where you can draw your signature or select signature image and then save the signature for future purpose.

Add New Signature ×

Name\*:   [Save Signature](#)

 Draw Signature Select Image



Imprint Settings

Date Imprinted     User Imprinted     Time Imprinted

Font Settings

Name:     Style:     Size:      Signature Color

**Tip:** Click on  icon to disable the Image page options toolbar. Once the Image page options toolbar is disabled, Click on  icon to access it again.

## Page Manipulation View

The Area offers a thumbnail view for all the unsubmitted items in the Page manipulation view. You can perform various operations on the thumbnails like split pages, cut or copy selected pages, paste those pages, remove unnecessary pages and rotate selected pages.

The following video covers how to

Click on the  icon to access the Page manipulation view as shown in the below screen:

**New World Company**  
 Floor 100, 100 Main Street  
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OUR ORDER	YOUR ORDER	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652

QUANTITY ORD.	QUANTITY SHIP	PART or MODEL NUMBER	DESCRIPTION	LIST PRICE	NET UNIT PRICE	AMOUNT
6	6	APIAPT103	Bamboo Blinds	1020.00	1020.00	10200.00
4	4	APIAT1C38	Writing Sets	200.50	200.50	10025.00
2	2	APIAT1C39	Umbrellas	30.00	30.00	2400.00
8	8	APIAT1C72	Cane Chair	693.20	693.20	5545.60
6	6	APIAT1C78	Cane Baskets	50.00	50.00	300.00
4	4	APIAPT103	Tea Chests	799.00	799.00	3196.00
2	2	APIAT1C38	Writing Desk	2600.00	2600.00	5200.00

Document Profile  
 Vendor: New World Company  
 Invoice Date: 02/26/2010  
 Invoice Amount: \$200,000.00  
 Invoice Number: 859652  
 PO Number:  
 Invoice Description:  
 Remit To ID:

You will see the Page manipulation view with all the unsubmitted items arranged as thumbnails separated by a thick bar as shown below:

Batch	Page Count
<input checked="" type="checkbox"/> 1908091405	1
<input type="checkbox"/> 1908091742	1
<input type="checkbox"/> 1908091903	3

The operations in the toolbar are explained as follows:

- **Split** : This option  splits the selected document. It will add a separator between the thumbnail items upon splitting.
- **Cut** : This option  temporarily removes the page(s) from the thumbnail viewer. You can use the shortcut key "**Ctrl + Shift + X**".
- **Copy** : This option  duplicates the selected page(s) from the thumbnail viewer. You can use the shortcut key "**Ctrl + Shift + C**".
- **Paste** : This option  enables you to insert pages from the clipboard. You can use the shortcut key "**Ctrl + Shift + V**".
- **Remove** : This option  permanently deletes the selected thumbnail page(s) from the thumbnail viewer. You can use the shortcut key "**Ctrl + Shift + D**".
- **Rotate Right**: This option  will turn the selected thumbnail page by 90° in clockwise direction. You can use the shortcut key "**Ctrl + Shift + R**".
- **Rotate left**: This option  will turn the selected thumbnail page by 90° in anti-clockwise direction. You can use the shortcut key "**Ctrl + Shift + L**".
- **Back to item viewer**: Click on  to navigate back to the item viewer.

**Note:** Drop point must be of type Barcode separator to enable **split** option.

## CONTEXT MENU

Right click on the thumbnail item to access the Context menu as shown below. You can view all the operations that can be performed with the selected thumbnail in the context menu.

The screenshot shows a document viewer interface with a context menu open over a thumbnail. The menu options are:

- Split
- Join this item to the next item
- Join this item to the previous item
- Remove separator Delete
- Cut selected pages Ctrl + Shift + X
- Copy selected pages Ctrl + Shift + C
- Paste Ctrl + Shift + V
- Remove selected pages Ctrl + Shift + D
- Rotate selected pages to the right Ctrl + Shift + R
- Rotate selected pages to the left Ctrl + Shift + L

The background shows an invoice for 'New World Company' with a table of items and a 'TOTAL' section.

Item No.	Item Description	Quantity	Unit Price	Total Price
127-08	1908091405	1	1908091405	1908091405
128	1908091742	1	1908091742	1908091742
129	1908091903	3	1908091903	5724275.709
<b>TOTAL NET</b>				<b>7838416.856</b>
<b>TOTAL</b>				<b>7838416.856</b>

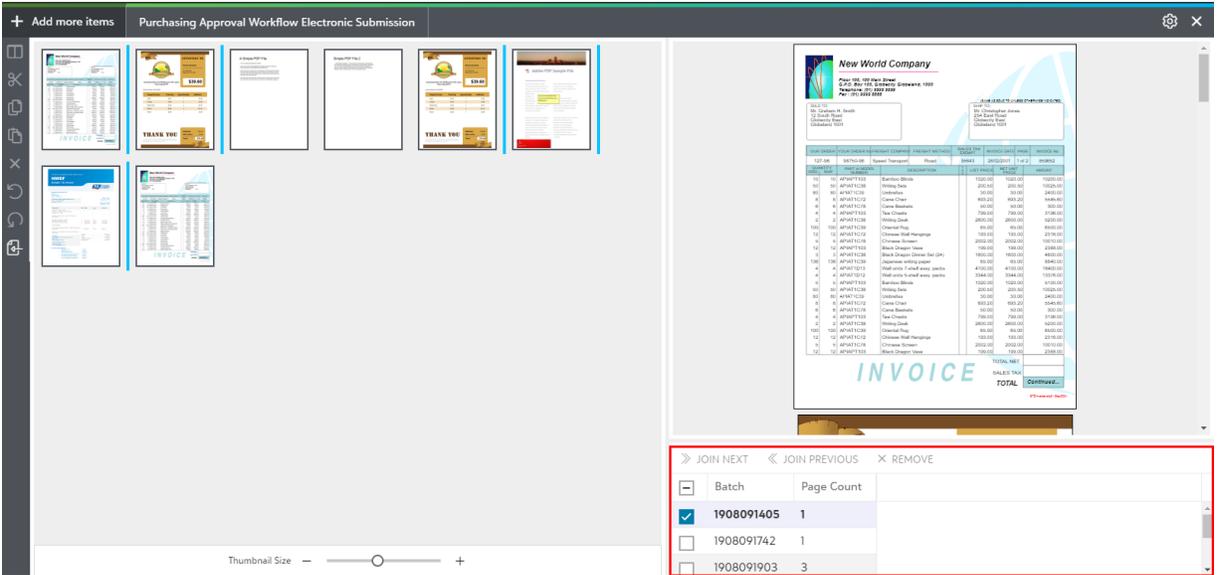
At the bottom, there is a table for item management:

Batch	Page Count	Remove
<input checked="" type="checkbox"/> 1908091405	1	<input type="checkbox"/>
<input type="checkbox"/> 1908091742	1	<input type="checkbox"/>
<input type="checkbox"/> 1908091903	3	<input type="checkbox"/>

**Note:** The operation that cannot be performed on the selected thumbnail item will be disabled.

## ITEM LIST IN PAGE MANIPULATION VIEW

This section displays a list of unsubmitted items as shown below:



The following options are available in the item list of the Page Manipulation View:

**JOIN NEXT:** This option enables you to merge the next page with the selected page.

**JOIN PREVIOUS:** This option enables you to merge the previous page with the selected page.

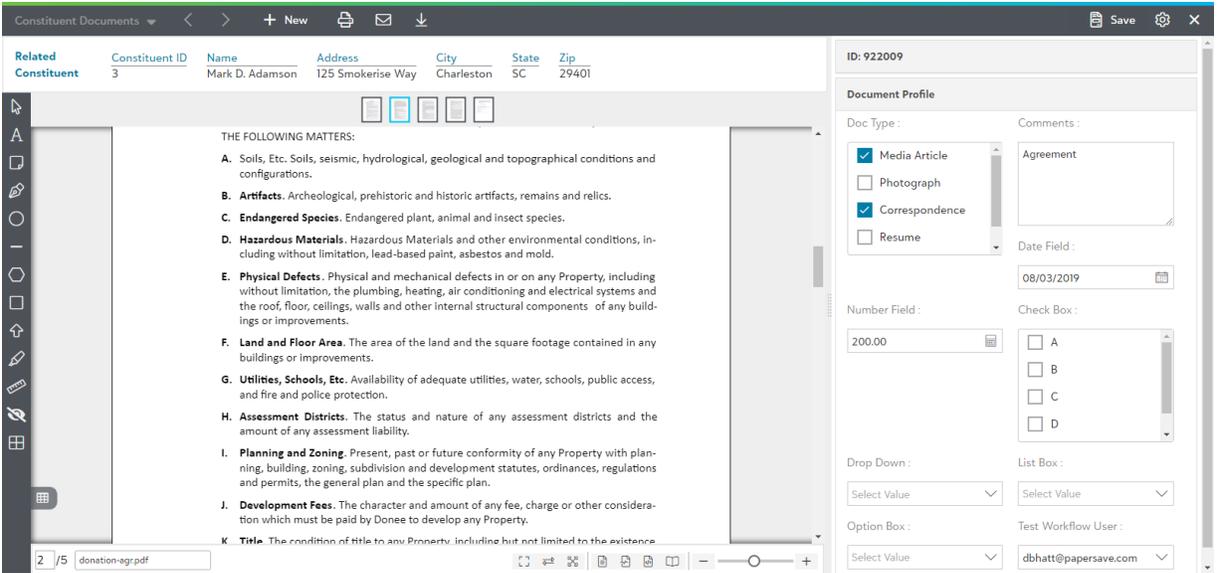
**REMOVE:** This option discards the selected page from the list.

## Validating and saving the document in item viewer

Once the documents are successfully acquired, you are redirected to the item viewer to validate and save the documents under the selected document type of an integrated app record.

Watch the [video](#) to know how to validate profile fields in the item viewer.

Various operations can be performed on the documents while working with them in the document viewer such as editing fields, adding annotations, saving one or more documents.



You can explore various topics for validating and saving the documents, such as:

- **Top level toolbar options for unsubmitted items**

Watch the [video](#) to know about the various toolbar options for unsubmitted items.

- **Page manipulation view for unsubmitted items**

Watch the [video](#) to know more about page manipulation view.

- **Settings Panel in the item viewer**

The following [video](#) covers the Settings Panel for the item viewer(unsubmitted items) in the Browse Area:

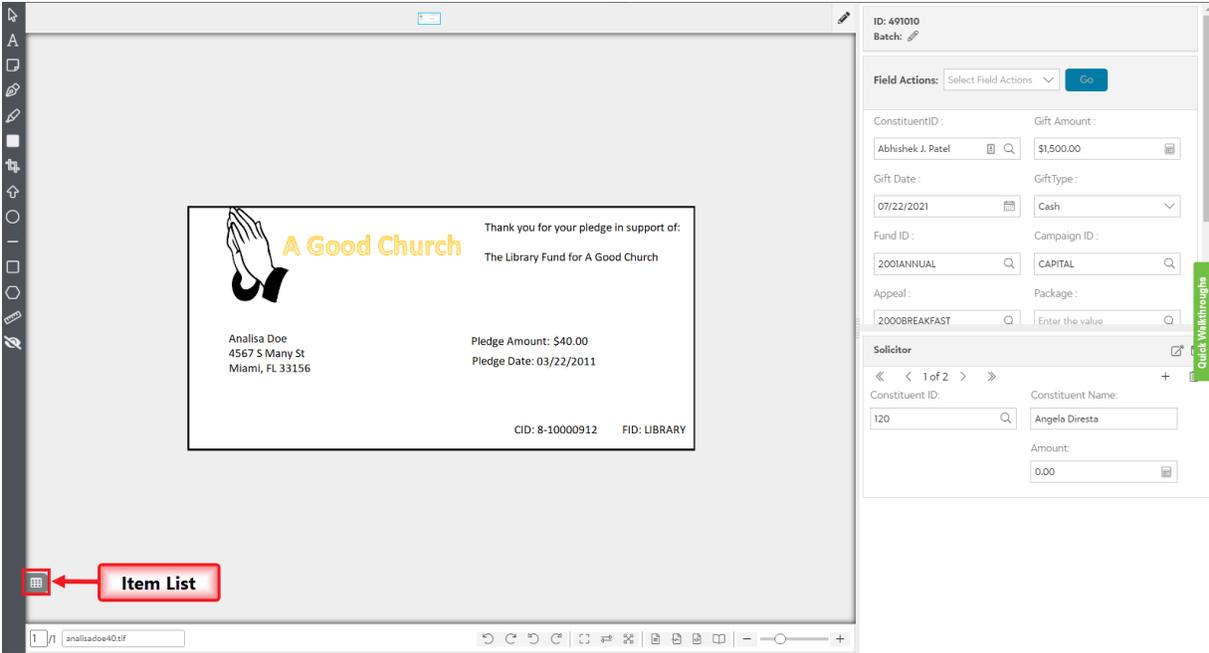
- **Using Image page options for unsubmitted items**

The following [video](#) explains the how to use Image annotations for unsubmitted items in the Browse Area.

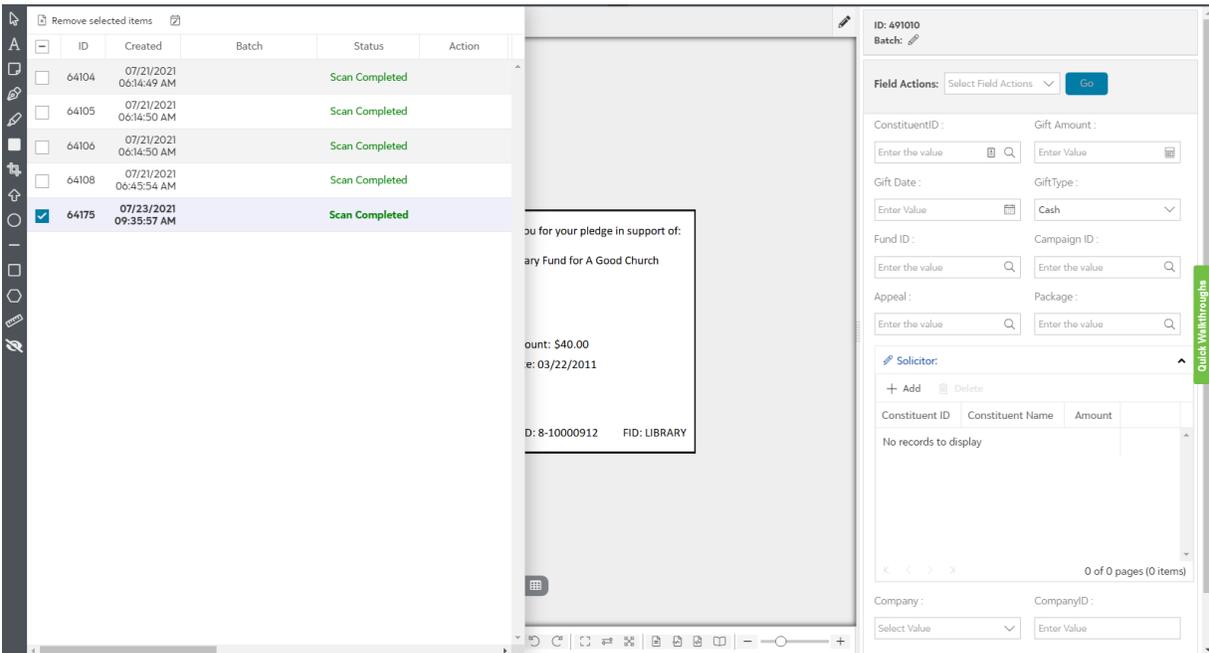
- **Save an acquired document from the item viewer**

## Item list

Submitted item list comprises the list of documents that are . In the Workflow item viewer, Click on  icon to access the submitted item list.



As you click on  icon in the item viewer, a slide out panel with the list of submitted items shall launch in the left corner of the screen. You can see the profile field details for all the submitted items as shown below:



- Double click on the desired item from the list to open it in the item viewer.

**Tip:** Status column will be visible for such items that include OCR processing.

## Annotation settings

This Setting option enables you to adjust the following preferences for each annotation tool in the Workflow Item Viewer.

## **Annotation Settings**

### **Text:**

Font:	Calibri	▼	10pt	▼
Text:	<input type="text"/>			
Vertical:	Top			▼
Horizontal:	Left			▼

### **Note:**

Fill:		▼		
Thickness:	<input type="text" value="1"/>			
Font:	Calibri	▼	10pt	▼
Text:	<input type="text"/>			
Vertical:	Top			▼
Horizontal:	Left			▼

### **Pen:**

Thickness:	<input type="text" value="1"/>
------------	--------------------------------

### **Circle:**

Fill:		▼
Thickness:	<input type="text" value="1"/>	

### **Line:**

Thickness:	<input type="text" value="1"/>
------------	--------------------------------

### **Polygone:**

Fill:		▼
Thickness:	<input type="text" value="1"/>	

### **Rectangle:**

Fill:		▼
-------	---	---

**Text, Note:** Select font, font size, default text, vertical and horizontal alignment.

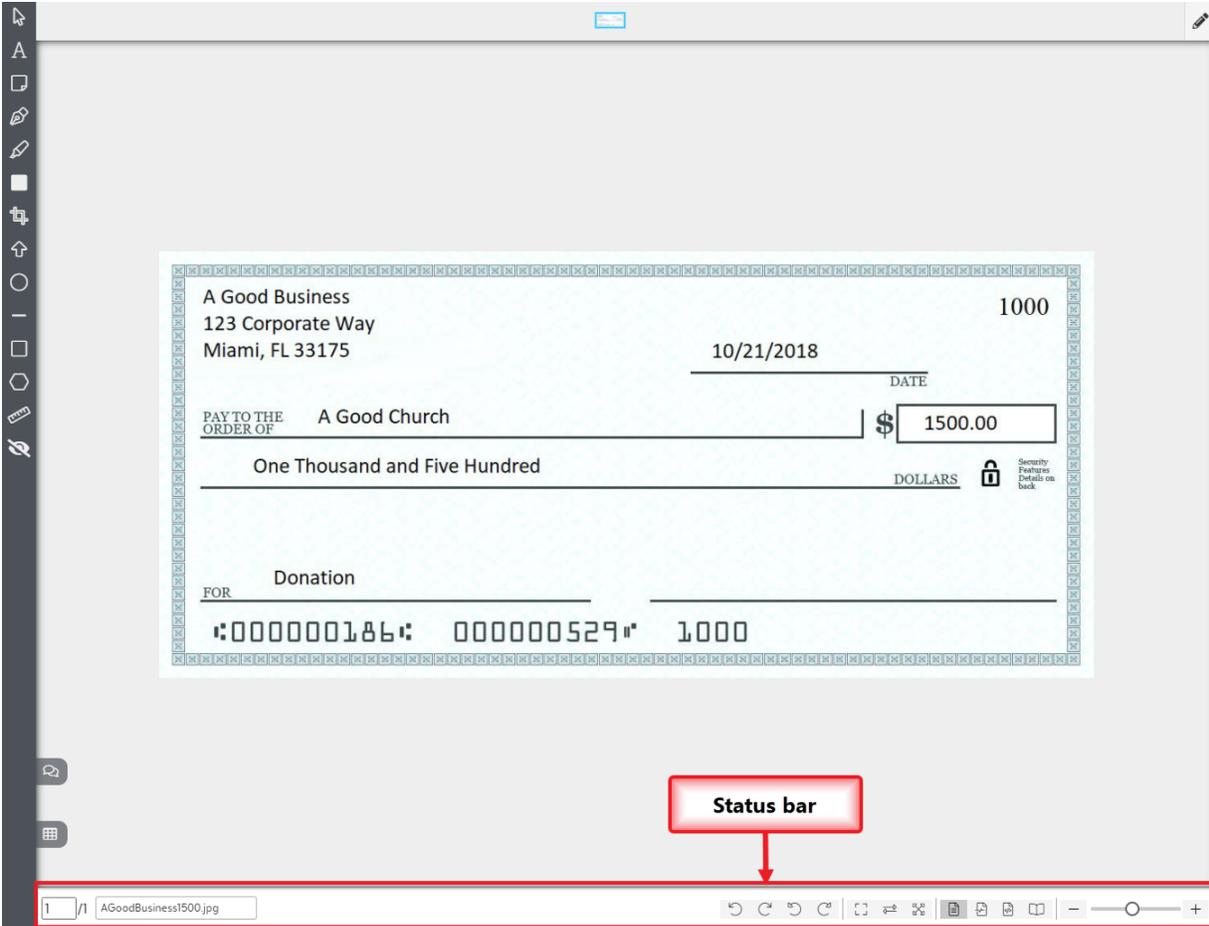
**Pen, Circle, Line, Polygon, and Arrow:** Select the thickness and color.

**Highlighter:** Select the color.

## Content Display options

Watch the [video](#) to learn about the various Content Display options.

The status bar in the item viewer allows you to control your preference around document display as shown in the below screen.



The following is the description of various Content Display options in the Item viewer:

**Page number and file name:**

This option displays the current page number with total number of pages along with the item's file name. The filename can be edited. You can also specify a page to go to by typing it into the textbox.

For e.g.: **X of Y (Z. file extension)**; where,

**X:** Current page number of file

**Y:** Total number of pages in file

**Z:** File name. extension

## Image Size options

- **Actual Size:** This option will display the document in its original display size.
- **Fit Width:** This option will adjust the display of the selected document to fit the width of the screen size.
- **Fit Visible:** This option will adjust the display of the selected document to fit the screen size.

## Page display options

- **Single page display:** This option sets the view to display one page at a time.
- **Vertical display:** This option sets the view to display multiple pages at time in a view that scrolls vertically.
- **Horizontal display:** This option sets the view to display multiple pages at time in a view that scrolls horizontally.
- **Double page display:** This option enables a two page view that scrolls vertically.

**Image/SVG Rendering option:** This option will appear only for PDF file format when rendering is required. By default, this option will be unselected and when you select on it, SVG rendering will get selected.

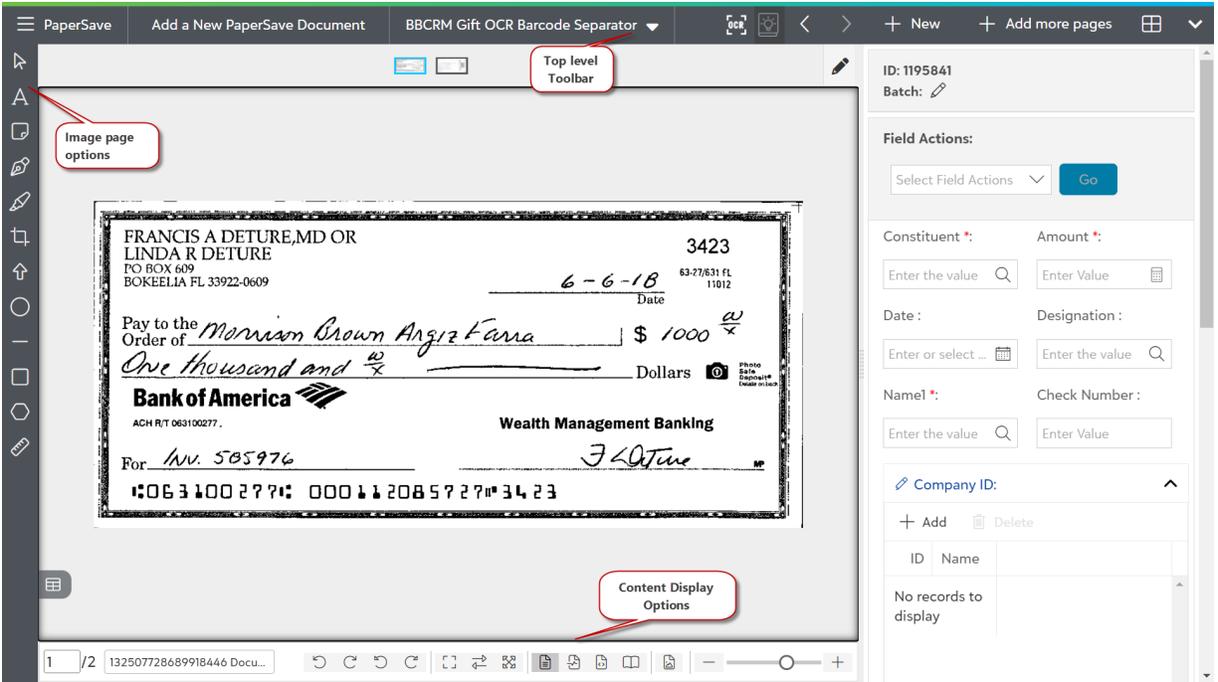
**Zoom Slider:** This slider will magnify or shrink the size of the item displayed on item viewer. Move the Zoom slider to increase/decrease the size of the item.

## Validating and submitting the Workflow documents

Unsubmitted Workflow items can be worked on from the item list and opened in the item viewer once they are acquired successfully. Various operations can be performed on Workflow items while working with them in the item viewer such as editing fields, adding annotations, page manipulation, submit one or more unsubmitted items, etc.

Watch the [video](#) to learn how to validate the Workflow item before submitting it to the Workflow.

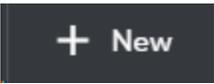
The below screen displays the various options available in the Item viewer for validating the Workflow item.



The following is the description of various options available to validate the Workflow item in the Workflow Area:

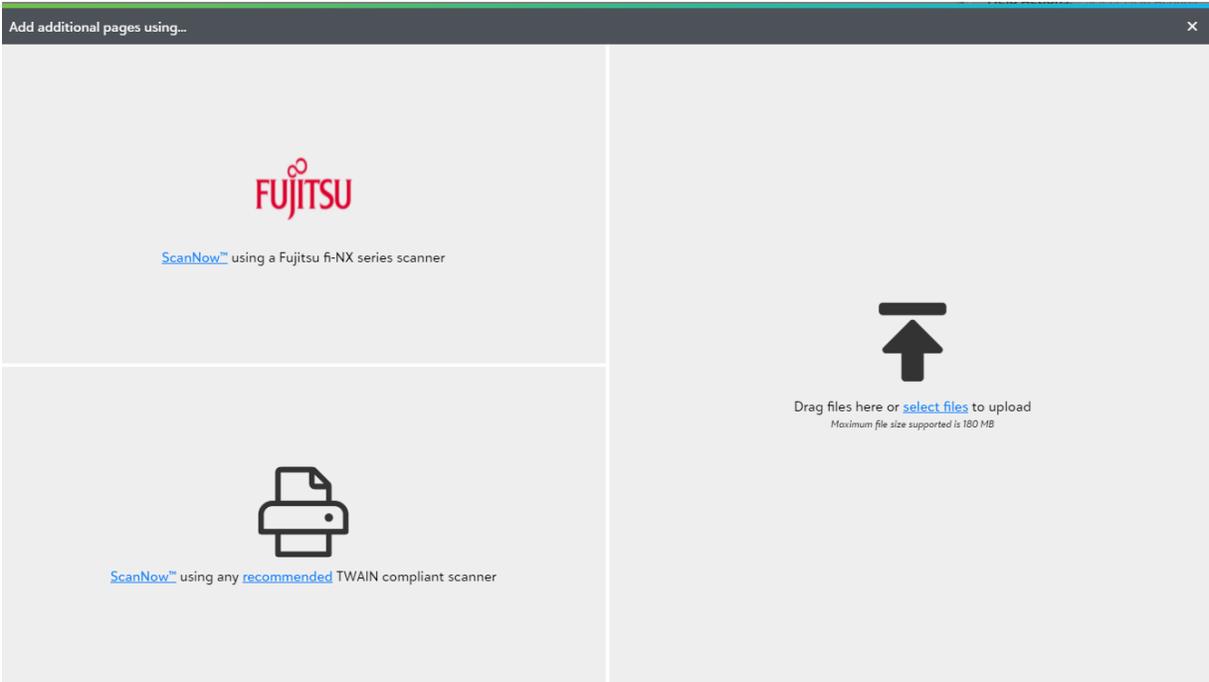
### 1) Top level toolbar options in the Item viewer for unsubmitted items:

The following are the options in the top level toolbar of item viewer for unsubmitted items:

- : Click on this option to navigate to the previous unsubmitted item. It will be disabled if there is no previous item.
- : Click on this option to navigate to the next unsubmitted item. It will be disabled if there is no next item.
- : Click on this option to switch to File capture options panel to acquire a new document.

 Add more pages

: Click on this option to add more pages to the current document. clicking on this option will display the following "Add additional pages" prompt.



: This option will navigate you to the Page Manipulation View for unsubmitted items in the Workflow Area where you can perform various operations such as cut, copy, paste, rotate, etc. on the unsubmitted items. Click [here](#) to know more about Page Manipulation View.



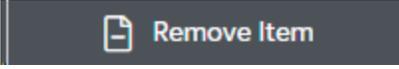
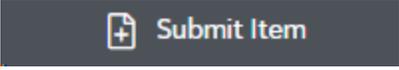
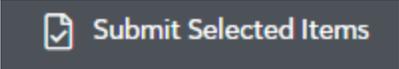
: Click on this option to print the current document.



: Click on this option to share the item via email. Currently, this feature is not yet implemented.



: Click on this option to download the current document.

- : Click on this option to process OCR on the items. Using this option will override the current profile field values.
- : Click on this icon to use the OCR learn by fingerprint or learn by key feature.
- : Click on this option to discard the current item.
- : Click on this option to submit the current unsubmitted item.
- : Click on this option to submit items selected in the unsubmitted item list.

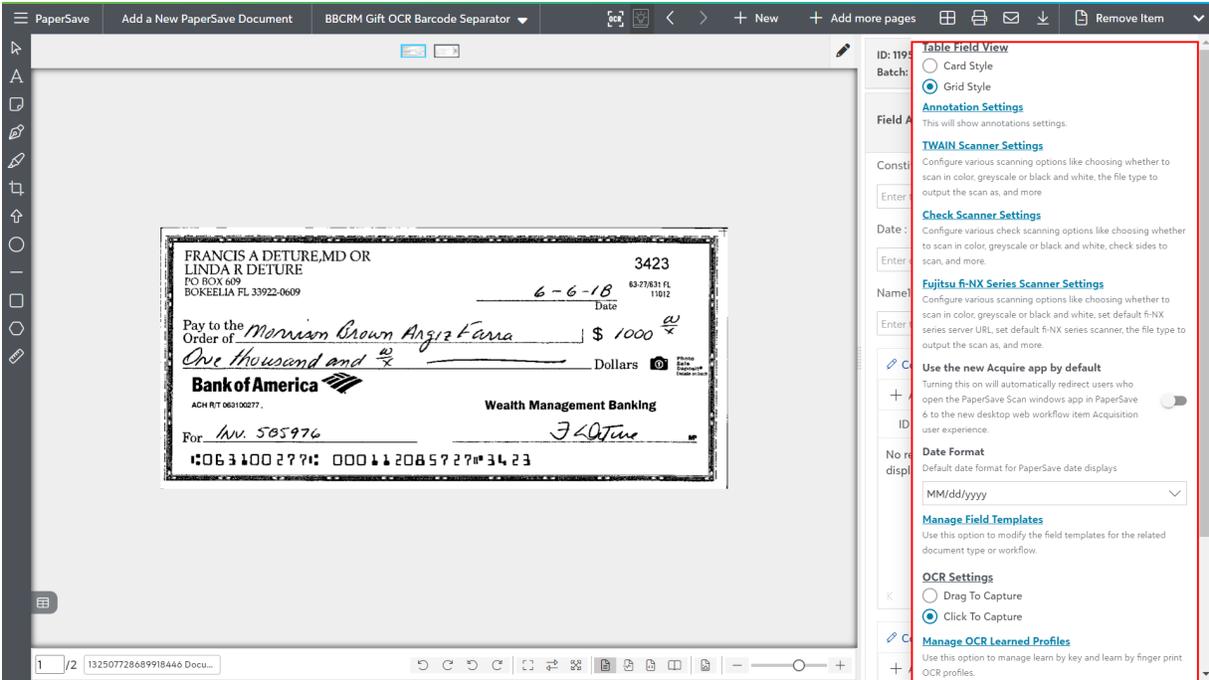
## 2)Using Image page options(Annotations) for Unsubmitted items

You can add different annotations using the Image page options toolbar on the left-hand corner of the screen. Click [here](#) to know more about it.

## 3)Item Viewer Settings panel for unsubmitted items

Watch the [video](#) to learn the Item Viewer Settings options for unsubmitted items.

-  : Click on this option to define your preferences in the Settings panel in Item viewer for unsubmitted items:



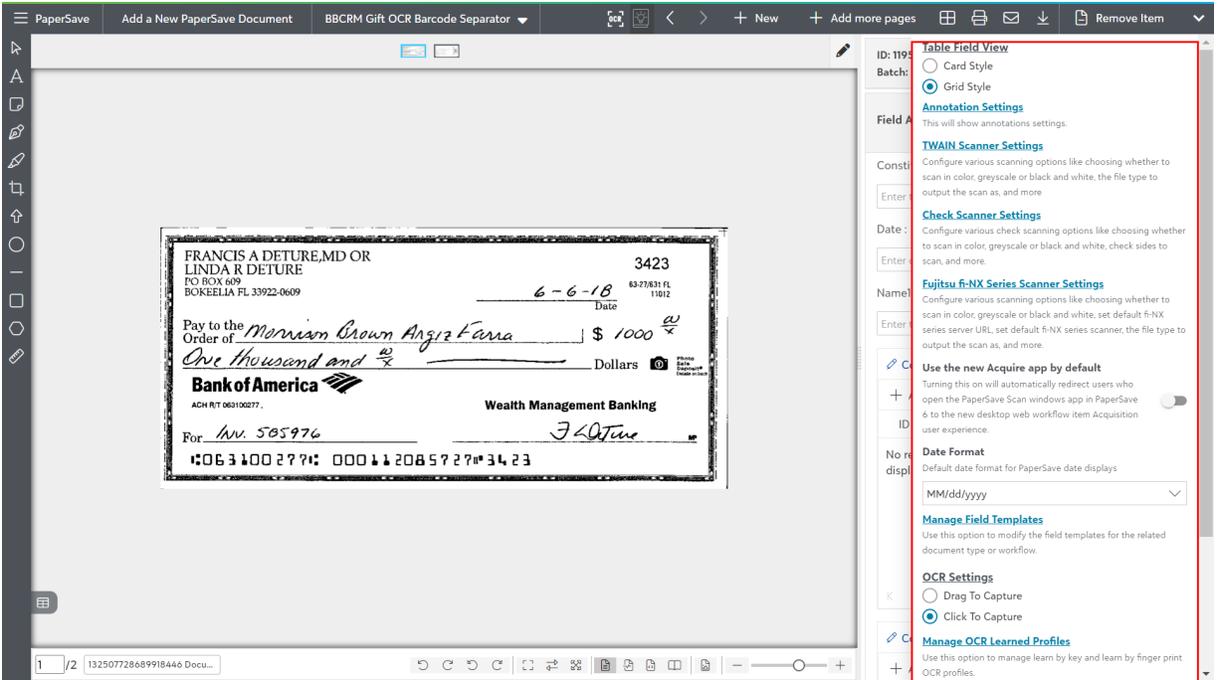
The following is the brief description of various preferences in the Settings panel:

#### a) **Table Field View**

PaperSave offers a widget with two different user interfaces (card style and grid style) for the table type fields in the document profile field panel. Card style is set as the default option.

a) **Card Style** : It switches the "table type field" widget to a card style view.

- Select the Card style option in the Table field view Settings, as shown below:

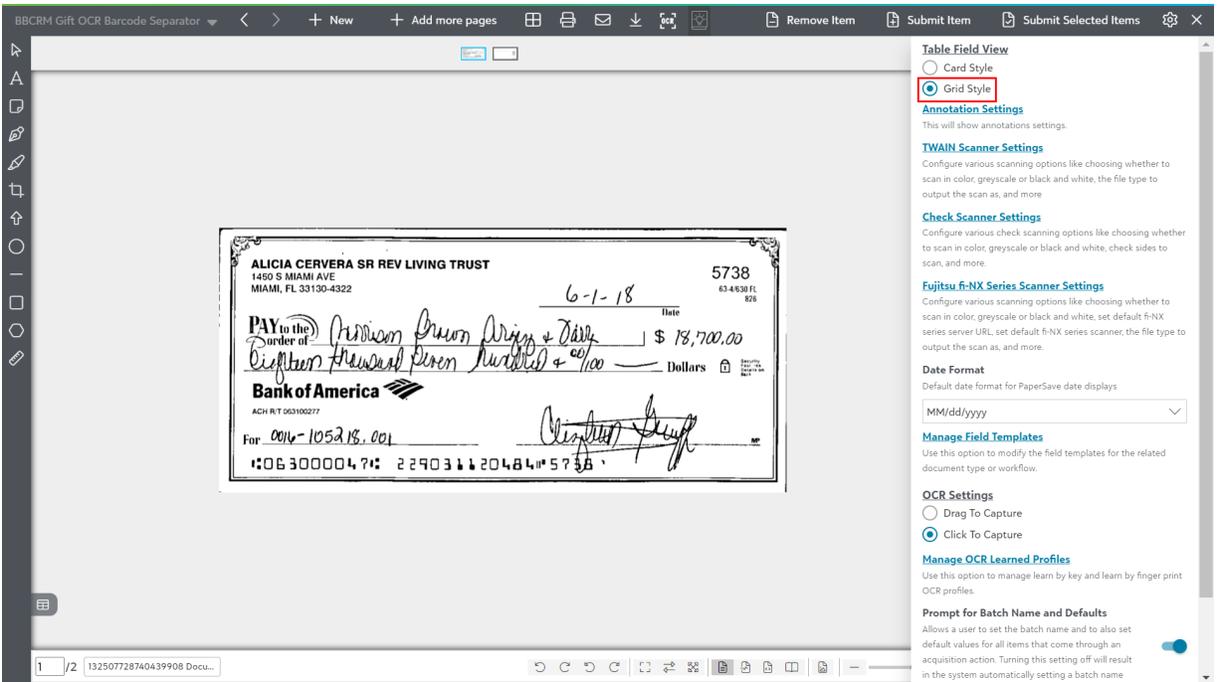


- You will see "**Card Style view**" for the Table type fields in the document profile field panel while editing the field as shown below.

The screenshot shows a software interface for processing checks. The main area displays a check from Bank of America, dated 6-6-18, for \$1000. The check is payable to Morrison Crown Anziz Ferra. The form on the right side of the interface has a 'Company ID' field highlighted with a red box. This field is currently empty and shows 'No records to display'. The form also includes fields for Constituent, Amount, Date, Designation, Name, and Check Number. The interface includes a top navigation bar with options like 'New', 'Add more pages', 'Remove Item', 'Submit Item', and 'Submit Selected Items'. The bottom status bar shows '1 / 2' and '132507728689918446 Docu...'.

b) **Grid Style:** It switches the "table type field" widget to Grid style view.

- Select the Grid style option in the Table field view Settings as shown below:



- You will see "**Grid Style view**" for the Table type fields in the document profile field panel as shown below.

The screenshot displays a software interface for document processing. The main window shows a check from Bank of America, dated 6-6-18, for \$1000.00, payable to Morrison Crown Anziz Ferra. The check includes the bank name, logo, and routing number 1063100277. The interface also features a sidebar with various tool icons and a top menu with options like 'New', 'Add more pages', 'Remove Item', 'Submit Item', and 'Submit Selected Items'. On the right, a data entry form is visible, containing fields for 'Constituent', 'Amount', 'Date', 'Designation', 'Name', and 'Check Number'. A 'Company ID' dropdown menu is open, showing a table with columns for 'ID' and 'Name', and a message stating 'No records to display'. The table is currently empty.

ID	Name
No records to display	

## b) Annotation Settings

This Setting option enables you to adjust the following preferences for each annotation tool in the Workflow Item Viewer.

[← Back To Settings](#)

### **TWAIN Scanner Settings**

Scan Type:

Page Sides to Scan:

DPI:

**Time in seconds before assuming scanning is complete**

Use this to set time in seconds before PaperSave assumes it is no longer receiving pages from the scanner. Once this time has passed after receiving a page, then PaperSave will consider the scanning of a specific stack to be complete. Configure this to a higher number if the speed of your scanner and or internet connection heavily fluctuates. Be advised that the longer you set this time to be, the slower scanning will feel.

**Show TWAIN driver settings before scanning**

Turning this on will prompt users with the native TWAIN settings panel of the scanner they are using. This will allow them to control scanner specific settings prior to scanning.

**Use a default scanner**

Setting this off will clear the default scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

**Prompt to continue scanning**

When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

**Text, Note:** Select font, font size, default text, vertical and horizontal alignment.

**Pen, Circle, Line, Polygon, and Arrow:** Select the thickness and color.

**Highlighter:** Select the color.

### c) Twain Scanner Settings

This Setting option enables you to configure the following scanner related preferences as shown below:

[← Back To Settings](#)

### **TWAIN Scanner Settings**

Scan Type:	Black and White	▼
Page Sides to Scan:	Single Side(Simplex)	▼
DPI:	200	▼

#### **Time in seconds before assuming scanning is complete**

Use this to set time in seconds before PaperSave assumes it is no longer receiving pages from the scanner. Once this time has passed after receiving a page, then PaperSave will consider the scanning of a specific stack to be complete. Configure this to a higher number if the speed of your scanner and or internet connection heavily fluctuates. Be advised that the longer you set this time to be, the slower scanning will feel.

3	▼	▲
---	---	---

**Show TWAIN driver settings before scanning**

Turning this on will prompt users with the native TWAIN settings panel of the scanner they are using. This will allow them to control scanner specific settings prior to scanning.

**Use a default scanner**

Setting this off will clear the default scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

**Prompt to continue scanning**

When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

- **Scan Type**

Black & White, Gray Scale, Color

**Tip:** We highly recommend using the **Black and White** scan option as it uses the least amount of disk storage space and yields the fastest processing.

- **Page Sides to Scan**

- Single Side
- Both sides

**Note:** If your scanner supports skipping or ignoring blank page, then we recommend you setting the Page Scan options to Scan **Both sides**(Duplex).

- **DPI ( Dots per inch)**

The smaller the DPI number, the less sharp the image will appear. However, size of the image will increase as you increase the DPI number.

**Note:** We recommend that you use 300 DPI.

- **Show TWAIN driver settings before scanning**

Turning this on will prompt users with the native TWAIN settings panel of the scanner they are using. This will allow them to control scanner specific settings prior to scanning.

- **Use a default scanner**

Setting this off will clear the default scanner chosen by you previously, and you will be prompted for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

- **Prompt to continue scanning**

When this option is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

d) **Check Scanner Settings**

This Setting option enables you to configure the following check scanner related preferences as shown below:

### Check Scanner Settings

Scan Type:  

Page Sides to Scan:  

Double Feed Detection:

Prompt to continue scanning

When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

Enable Rear Endorser:

Endorsement type\*:  

Endorsement Line 1\*:  

Endorsement Line 2:

Endorsement Line 3:

Endorsement Line 4:

Endorsement Line 5:

- **Scan Type**

Black & White, Gray Scale, Color

**Tip:** We highly recommend you to use Black and White scan option as it uses the least amount of disk storage space and yields fastest processing.

- **Page Sides to Scan**

- Single Side (Simplex)
- Both Sides

**Note:** We recommend you setting the Page Scan Options to Scan Both Sides (Duplex) if your scanner supports skipping or ignoring blank page.

- **Prompt to continue scanning:**

When this option is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

- **Enable Rear Endorser :**

This option allows the user to enable and disable the rear endorsement for the checks. The endorsement can be virtual or physical, depending on your check scanner.

- **Endorsement Type:**

This option will define if the rear endorsement is printed on the physical check or on the image of the check in the gift item document. You can select one or both options.

- **Endorsement Line 1 to Endorsement line 5:**

This sets the lines you want printing (virtually or physically) on the back of checks. This option requires on the Enable Rear Endorser option to be turned **on**.

**Note:** Your check scanner must support this feature for using Rear endorser options.

### e) Fujitsu fi- NX Series Scanner Settings

This Setting option enables you to configure the following Fujitsu fi-NX scanner related preferences, as shown below:

#### Fujitsu fi-NX Series Scanner Settings

Scan Type:  

Page Sides to Scan:  

Use a default fi-NX scanner

Setting this off will clear the default fi-NX scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

Prompt to continue scanning

When this is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

- **Scan Type**

Black & White, Gray Scale, Color

**Tip:** We highly recommend you to use **Black and White** scan option as it uses the least amount of disk storage space and yields fastest processing.

- **Page Sides to Scan**

- Single Side
- Both sides

**Note:** We recommend setting the page scan options to scan both sides (Duplex) if your scanner supports skipping or ignoring blank page.

- **Use a default fi-NX scanner**

Setting this off will clear the default fi-NX scanner chosen by you in the prompt that asks for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

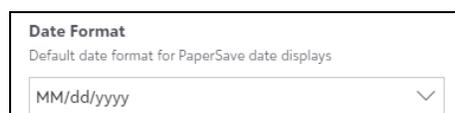
- **Prompt to continue scanning:**

When this option is set the scanning utility will prompt you whether or not to continue adding pages to a scan batch.

f) **Use the new Acquire app by default:** Turning this on will automatically redirect users who open the PaperSave Scan windows app in PaperSave 6 to the new desktop web workflow item Acquisition user experience.

g) **Date Format**

This option enables the user to change the default date format. By default it is MM/dd/yyyy.



**Date Format**  
Default date format for PaperSave date displays  
MM/dd/yyyy

You can define the desired preferences to any of the following date format options.

- MM-dd-yyyy
- MM/dd/yyyy
- dd-MM-yyyy
- dd/MM/yyyy
- yyyy-MM-dd

Once any of the above date format is selected, it should save/update the new date format for that user upon exiting of the Settings menu.

#### h) **Manage Field Templates**

User this option to modify the field templates for the related document type or workflow.



#### i) **OCR Settings:**

This Setting option enables you to configure OCR-related preferences in the Workflow item viewer, as follows. Set the preference to use the drag or click action to correct the profile fields values on items processed by OCR.



- **Drag to Capture:** Choose this option to capture the value from the document and drag that selected value to desired document profile field.
- **Click to Capture:** Choose this option to capture the value from the document and click on the desired document profile field to auto-fill the captured value.

**Note:** The Click/Drag to Capture options will only be applicable for documents processed by OCR.

## j) Manage OCR Learned Profiles

You can use this option to manage the OCR learn by key and learn by finger print OCR profiles.

**Manage OCR Learned Profiles**  
Use this option to manage learn by key and learn by finger print OCR profiles.

## k) Prompts for Batch Name and Defaults

Enabling this option turns on the prompt for batch and field defaults. The prompt is on by default but can be turned off by selecting the checkbox labeled "**Don't ask me again**" in the "**Set Batch and Field Defaults**" dialog. Turning this setting off will result in the system automatically setting a batch name. Similarly, Setting the option **ON** restores the prompt.

**Prompt for Batch Name and Defaults**  
Allows a user to set the batch name and to also set default values for all items that come through an acquisition action. Turning this setting off will result in the system automatically setting a batch name

## l) Show Quick Walkthrough Tab

Use the toggle button to show/hide the **green** Quick walkthroughs on the screen.

**Show Quick Walkthroughs Tab**  
Use this option to show/hide the Quick Walkthroughs tab. Turning off this setting will hide the tab.

## m) Use Client-Side PDF Rendering

"Use Client-Side PDF Rendering" option within the item viewer's settings panel which on enabling helps to load the PDF document faster than the Server-side rendering. For more details, refer to [Client-Side Rendering](#).

**Use Client-Side PDF Rendering**

Use this setting for any PDF where you experience rendering issues. turning this setting to ON will render the PDF documents faster. however, some PDF files cannot be rendered correctly using this setting. this setting will be set for the current document only.



## Review and edit Profile fields

The field panel is located at the right-side of the item viewer with various fields related to document type or Workflows. The field data can be automatically captured via Optical Character Recognition (OCR) technology, looked up against values in Dynamics GP's database (using SQL) or entered in manually. Fields that are captured via OCR will show a percentage value in parentheses next to the field label. This percentage represents the confidence that the OCR engine has in the value it captured. The more exact the match, the higher the confidence score.

It is recommended that you double-check and validate all values captured by OCR. Still it would be best to focus on validating all the values with a low confidence score. If the auto field values are incorrect or inaccurate, then you can edit such profile fields manually or use the drag to capture tool to automatically select text from the document, drag, and then drop it on the field. See the [drag to capture](#) section for more details on how this works.

The fields will vary across different Workflows and document type defined in the Configuration Area. For Example - A date field value will have a date picker widget to enter the date value. It can be modified manually such as in cases where the OCR may not have captured the right date.

Similarly, based on the Workflow fields properties, some fields such as vendor, PO Number, etc can be looked up against the Dynamics 365 Finance's database using different properties. For amount related fields such as Invoice amount, you can optionally use the calculator widget to perform desired calculations and determine the amount. The value of this field is defaulted to the amount captured by OCR in case if the document went through OCR processing successfully.

You can default the view as Card style view or Grid style view in Table Type fields such as Line items, distribution, Purchase Receipt Line, etc. This preference can be defined in the settings panel.

**Note:** The fields in the Workflow item field panel may vary based on the user's access rights across different Workflows.

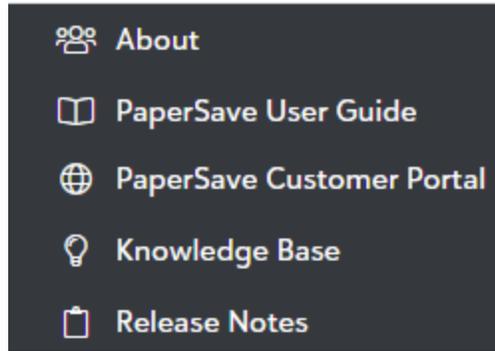
## Correcting fields using Drag to Capture tool

The Drag to Capture tool  allows you to hover over a word, grab onto it, and drag it over a field and let go to drop that word into the field. This option is available on the top-level toolbar of unsubmitted item viewer. You can capture (which draws a highlighted area around the selected text) multiple words, grab onto them, and drag them over a field to drop all those words into the field. This is a very useful tool to validate and correct values that were not captured correctly by OCR or to help make manual entry more efficient.

**Note:** This option is only applicable for documents or items that successfully went through the OCR process.

## Help

The Help menu offers various options such as About section, User Guide, Customer Portal, Knowledge Base and Release Notes to provide you assistance with the PaperSave. Click on the  icon from the top-right section in the Application bar to access the PaperSave Help menu, as shown below.



Watch the [video](#) to learn how to access PaperSave Help menu for product related assistance.

The following is a brief description of various options in the Help menu.

### **1) About**

This option displays information such as Product Name, Version, Build No, Copyright, Company Name, PaperSave Service URL and a brief description about the product.

## **2) PaperSave User Guide**

Click on this option to navigate to the PaperSave User Guide and learn about various features and functionalities.

## **3) PaperSave Customer Portal**

Click on this option to navigate to the Customer Portal and share your queries or open a support case with PaperSave, if required.

## **4) Knowledge Base**

Click on this option to navigate to the PaperSave Knowledge base to explore PaperSave reference articles.

## **5) Release Notes**

Click on this option to navigate to the PaperSave Release Notes.

## **Group Ownership for Workflow**

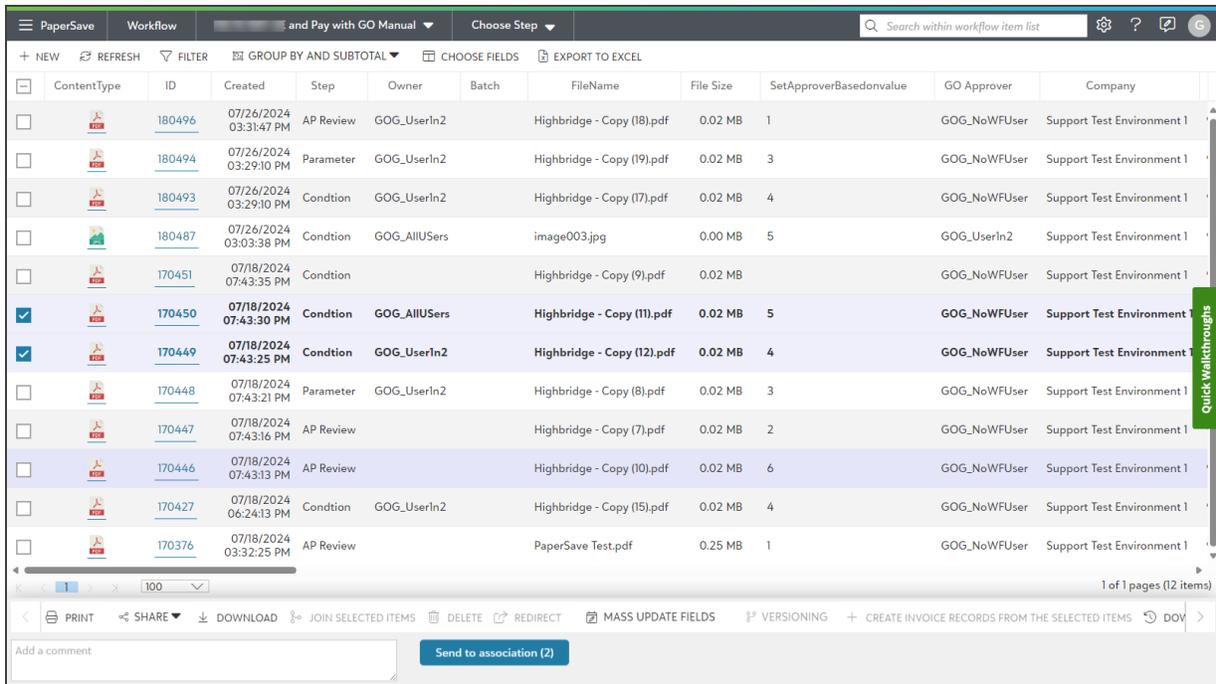
Now, PaperSave has started supporting the user to set a "Group" as the "Target Owner" while designing the Workflow. Click [here](#) to learn how to set "Group" as the owner of the Workflow. This document gives information about the behaviour when the group member accesses the Workflow item within the "Workflow Item List".

The following topics are covered in this section:

- [Accessing the Workflow Items owned by the Group](#)
- [Raising the Workflow events for the Group owned Workflow](#)
- [Accessing the Group owned Workflow Item from Email Notification](#)

## Raising the Workflow events for the Group owned Workflow

1) When multiple Workflow items are selected, the system checks if any items are being accessed by another group member. If none are accessed, users can raise bulk events and use toolbar options.



The screenshot displays a web-based interface for managing workflow items. At the top, there are navigation tabs for 'PaperSave', 'Workflow', and 'and Pay with GO Manual'. A search bar is located on the right. Below the navigation, there are options for '+ NEW', 'REFRESH', 'FILTER', 'GROUP BY AND SUBTOTAL', 'CHOOSE FIELDS', and 'EXPORT TO EXCEL'. The main area is a table with columns: Content Type, ID, Created, Step, Owner, Batch, FileName, File Size, Set Approver Based on value, GO Approver, and Company. Two items are selected, indicated by blue checkmarks in the first column. The selected items are:

Content Type	ID	Created	Step	Owner	Batch	FileName	File Size	Set Approver Based on value	GO Approver	Company
PDF	170450	07/18/2024 07:43:30 PM	Condition	GOG_AllUsers		Highbridge - Copy (11).pdf	0.02 MB	1	GOG_NoWFUser	Support Test Environment 1
PDF	170449	07/18/2024 07:43:25 PM	Condition	GOG_UserIn2		Highbridge - Copy (12).pdf	0.02 MB	4	GOG_NoWFUser	Support Test Environment 1

At the bottom of the interface, there is a toolbar with options: PRINT, SHARE, DOWNLOAD, JOIN SELECTED ITEMS, DELETE, REDIRECT, MASS UPDATE FIELDS, VERSIONING, and CREATE INVOICE RECORDS FROM THE SELECTED ITEMS. A 'Send to association (2)' button is visible, along with a comment input field.

2) If any group member is accessing any selected Workflow item, event buttons and toolbar options will not be displayed as shown below.

Content Type	ID	Created	Step	Owner	Batch	FileName	File Size	SetApproverBasedonvalue	GO Approver	Company
<input type="checkbox"/>	180496	07/26/2024 03:31:47 PM	AP Review	GOG_UserIn2		Highbridge - Copy (18).pdf	0.02 MB	1	GOG_NoWFUser	Support Test Environment 1
<input type="checkbox"/>	180494	07/26/2024 03:29:10 PM	Parameter	GOG_UserIn2		Highbridge - Copy (19).pdf	0.02 MB	3	GOG_NoWFUser	Support Test Environment 1
<input type="checkbox"/>	180493	07/26/2024 03:29:10 PM	Condition	GOG_UserIn2		Highbridge - Copy (17).pdf	0.02 MB	4	GOG_NoWFUser	Support Test Environment 1
<input type="checkbox"/>	180487	07/26/2024 03:03:38 PM	Condition	GOG_AllUsers		image003.jpg	0.00 MB	5	GOG_UserIn2	Support Test Environment 1
<input type="checkbox"/>	170451	07/18/2024 07:43:35 PM	Condition			Highbridge - Copy (9).pdf	0.02 MB		GOG_NoWFUser	Support Test Environment 1
<input checked="" type="checkbox"/>	170450	07/18/2024 07:43:30 PM	Condition	GOG_AllUsers		Highbridge - Copy (11).pdf	0.02 MB	5	GOG_NoWFUser	Support Test Environment 1
<input type="checkbox"/>	170449	07/18/2024 07:43:25 PM	Condition	GOG_UserIn2		Highbridge - Copy (12).pdf	0.02 MB	4	GOG_NoWFUser	Support Test Environment 1
<input checked="" type="checkbox"/>	170448	07/18/2024 07:43:21 PM	Parameter	GOG_UserIn2		Highbridge - Copy (8).pdf	0.02 MB	3	GOG_NoWFUser	Support Test Environment 1
<input type="checkbox"/>	170447	07/18/2024 07:43:16 PM	AP Review			Highbridge - Copy (7).pdf	0.02 MB	2	GOG_NoWFUser	Support Test Environment 1
<input type="checkbox"/>	170446	07/18/2024 07:43:13 PM	AP Review			Highbridge - Copy (10).pdf	0.02 MB	6	GOG_NoWFUser	Support Test Environment 1
<input type="checkbox"/>	170427	07/18/2024 06:24:13 PM	Condition	GOG_UserIn2		Highbridge - Copy (15).pdf	0.02 MB	4	GOG_NoWFUser	Support Test Environment 1
<input type="checkbox"/>	170376	07/18/2024 03:32:25 PM	AP Review			PaperSave Test.pdf	0.25 MB	1	GOG_NoWFUser	Support Test Environment 1

1 of 1 pages (12 items)

PRINT SHARE DOWNLOAD JOIN SELECTED ITEMS DELETE REDIRECT MASS UPDATE FIELDS VERSIONING CREATE INVOICE RECORDS FROM THE SELECTED ITEMS

3) If multiple members raise an event for the same item, only the first action is considered, and subsequent actions are disregarded with a "PaperSave was unable to raise the Workflow event" dialog; similarly, when a group member selects items being viewed by others and tries to raise a bulk event, it proceeds only for items not being viewed, with a notification listing the items for which the event cannot be raised as shown below.

The screenshot displays the PaperSave Workflow interface. An error dialog box is overlaid on the workflow items table. The error message reads: "Error: PaperSave was unable to raise the workflow event for items listed below because either they were being viewed by another user or they are no longer in the same workflow step. 1. 180494". A "Dismiss" button is visible at the bottom right of the dialog box. The background table lists various workflow items with columns for ID, Created, Step, Owner, Batch, FileName, File Size, SetApproverBasedonvalue, GO Approver, and Company.

ContentType	ID	Created	Step	Owner	Batch	FileName	File Size	SetApproverBasedonvalue	GO Approver	Company
	180496	07/26/2024 03:31:47 PM	Payment Review	GOG_UserIn2		Highbridge - Copy (18).pdf	0.02 MB	1	GOG_NoWFUser	Support Test Env
	180494	07/26/2024 03:29:10 PM	Parameter	gouser001		Highbridge - Copy (19).pdf	0.02 MB	3	GOG_NoWFUser	Support Test Env
	180493	07/26/2024 03:29:10 PM	Condition	GOG_UserIn2		Highbridge - Copy (17).pdf	0.02 MB	4	GOG_NoWFUser	Support Test Env
	180487	07/26/2024 03:29:10 PM	Condition	GOG_AllUsers		Image003.png	0.00 MB	5	GOG_UserIn2	Support Test Env
	170451	07/18/2024 07:43:13 PM	AP Review	GOG_NoWFUser		Highbridge - Copy (11).pdf	0.02 MB	2	GOG_NoWFUser	Support Test Env
	170450	07/18/2024 07:43:13 PM	AP Review	GOG_NoWFUser		Highbridge - Copy (10).pdf	0.02 MB	6	GOG_NoWFUser	Support Test Env
	170449	07/18/2024 06:24:13 PM	Condition	GOG_UserIn2		Highbridge - Copy (15).pdf	0.02 MB	4	GOG_NoWFUser	Support Test Env
	170448	07/18/2024 06:24:13 PM	AP Review	GOG_NoWFUser		Highbridge - Copy (14).pdf	0.02 MB	2	GOG_NoWFUser	Support Test Env
	170447	07/18/2024 07:43:16 PM	AP Review	GOG_NoWFUser		Highbridge - Copy (11).pdf	0.02 MB	2	GOG_NoWFUser	Support Test Env
	170446	07/18/2024 07:43:13 PM	AP Review	GOG_NoWFUser		Highbridge - Copy (10).pdf	0.02 MB	6	GOG_NoWFUser	Support Test Env
	170427	07/18/2024 06:24:13 PM	Condition	GOG_UserIn2		Highbridge - Copy (15).pdf	0.02 MB	4	GOG_NoWFUser	Support Test Env
	170376	07/18/2024 03:32:25 PM	AP Review	GOG_NoWFUser		PaperSave Test.pdf	0.25 MB	1	GOG_NoWFUser	Support Test Env

## Accessing the Group owned Workflow Item from Email Notification

1) When a group member opens a group-owned Workflow item from a received email notification or shared link if no other member has opened it, then they become the owner, and the Workflow item displays normally with full access as shown below. Click here to [learn](#) more about email notification.

The screenshot displays a software interface with a central PDF viewer and a right-hand form panel. The PDF document is from Highridge Spring Water Co., Inc. and contains the following text:

Highridge Spring Water Co., Inc.  
 6.0 Hwy 208  
 WILSON, NC 27158  
 WVA 00100 0001 000-0000  
 London 3463 884-7028

Invoice # 10753  
 Date: 07/18/2024, 08:00am  
 Delivery Date: 08/01/2024  
 Due Date: 08/15/2024

Account # 01583  
 01

DATE RECEIVED BY: 08/01/2024

Item	Qty	Price	Amount
1 GAL WATER 00100	1	0.45	0.45
00100000000000000000	1	0.50	0.50
00100000000000000000	1	0.00	0.00
TOTAL			0.95

Notes: 00100000000000000000 01.00  
 00100000000000000000 01.00  
 00100000000000000000 01.00

00100000000000000000 01.00  
 00100000000000000000 01.00  
 00100000000000000000 01.00

Best Delivery: 08/01/2024  
 mline See exact Delivery date visit edr: [www.highridgespring.com](http://www.highridgespring.com)

The right-hand form panel contains the following information:

ID: 180493 | Step: Condtion | Owner: gouser001  
 Batch:

Buttons: Send to association, Add a comment

Field Actions:  Select Field Actions

SetApproverBasedonvalue: GO Approver:

Company:  CompanyID:

Comments:  Vendor:

VendorID:

Invoice Number:  Invoice Date:

Invoice Amount:

Distribution:

Table Headers: Account Number, Account Description, Am

2) If another member has already opened the item, the current user will see the Workflow item in a read-only mode with hidden event buttons as shown below.

The screenshot displays a web application interface. On the left, a PDF document is open, showing a bill from Highbridge Spring Water Co., Inc. for \$100.00. The bill includes a table of charges and a total amount. On the right, a form is visible with various fields for data entry. A notification at the top right indicates that another user is accessing the workflow item, and certain features are disabled. A 'Quick Walkthroughs' button is located on the right side of the form.

**Highbridge Spring Water Co., Inc.**  
 P.O. Box 200  
 10000 W. 100th Street  
 Omaha, NE 68147  
 (402) 426-1000

**Invoice # 170450**  
 Billing Date: 07/18/2024  
 Billing Period: 07/01-07/31/2024

Item	Qty	Price	Amount
1 GOG WATER SERVICE	1	0.00	0.00
2 GOG WATER SERVICE	2	0.00	0.00
3 GOG WATER SERVICE	1	0.00	0.00
<b>TOTAL</b>			<b>100.00</b>

**Invoice Amount: \$100.00**

**Form Fields:**  
 ID: 170450 | Step: Complete  
 Batch: [Empty]  
 Field Actions: Select Field Actions [Go]  
 SetApproverBasedonvalue: GO Approver: [GOG\_NoWFUser]  
 Company: [Support Test Environ... | 9003]  
 Vendor: [Ns payee ven003 Dup | 418]  
 Invoice Number: [NSAEPay170450] | Invoice Date: [07/18/2024]  
 Invoice Amount: [100.00]  
 Distribution:  
 + Add - Delete  
 Account Number | Account Description | Amount  
 01-1000-01-000 | Operating Cash Account

**Note:** The first group member to open the Workflow item is considered as the owner, while subsequent members have read-only access to the opened Workflow items.

## Accessing the Workflow Items owned by the Group

1) When a group member has accessed or opened the group-owned Workflow, then the opened group member becomes the owner, and the "Owner" column displays their name. After closing or switching to another Workflow item, ownership reverts to the group, and the "Owner" column shows the group name.

PaperSave Workflow												
Pay with Group Ownership Payment Review												
Search within workflow item list												
+ NEW REFRESH FILTER GROUP BY AND SUBTOTAL CHOOSE FIELDS EXPORT TO EXCEL												
	ContentType	ID	Created	Step	Owner	Batch	FileName	File Size	Company	GP Database Name	Vendor	VendorID
<input type="checkbox"/>		<a href="#">170342</a>	07/17/2024 03:41:54 PM	Payment Review	QA Team		PaperSave Test.pdf	0.25 MB	Fabrikam, Inc.	TWO	Uptown Trust	UPTOWNTI
<input type="checkbox"/>		<a href="#">170344</a>	07/17/2024 04:16:48 PM	Payment Review	Doc Group		Northwind Traders 112721.pdf	0.46 MB	Fabrikam, Inc.	TWO	Uptown Trust	UPTOWNTI

PaperSave Workflow												
nd Pay with Group Ownership Payment Review												
Search within workflow item list												
+ NEW REFRESH FILTER GROUP BY AND SUBTOTAL CHOOSE FIELDS EXPORT TO EXCEL												
	ContentType	ID	Created	Step	Owner	Batch	FileName	File Size	Company	GP Database Name	Vendor	VendorID
<input type="checkbox"/>		<a href="#">170342</a>	07/17/2024 03:41:54 PM	Payment Review	Nitin Shudra		PaperSave Test.pdf	0.25 MB	Fabrikam, Inc.	TWO	Uptown Trust	UPTOWN
<input type="checkbox"/>		<a href="#">170344</a>	07/17/2024 04:16:48 PM	Payment Review	Nitin Shudra		Northwind Traders 112721.pdf	0.46 MB	Fabrikam, Inc.	TWO	Uptown Trust	UPTOWN

2) If another group member accesses the workflow after the previous member has finished, the new member becomes the owner, and the "Owner" column displays their name.

3) If no group member has opened the workflow, the entire group remains the owner, and the "Owner" column displays the group name.

**Note:** If a group member who is not the owner, opens a group-owned Workflow item in the "Workflow Item Viewer", then the profile fields, annotations, and top toolbar options appear as read-only, Workflow event buttons get hidden, and a toast notification appears on the screen as shown below.

The screenshot displays a web application interface for viewing a workflow item. The main content area shows a PDF document titled "Highbridge Spring Water Co., Inc." with a table of items and a distribution table. The right-hand side contains a form for editing the workflow item, with fields for "SetApproverBasedonvalue", "Company", "Support Test Environm...", "Comments", "Vendor", "Invoice Number", "Invoice Date", and "Invoice Amount". A "Distribution" table is also visible at the bottom of the form. A blue toast notification at the top right states: "gouser002 is already accessing this workflow item. Consequently, the 'Workflow Events' and 'Profile Fields' are temporarily disabled." A green vertical bar on the right edge of the form is labeled "Quick Walkthroughs".

Item	Qty	Price	Amount
1 CELL WATER SERVICE	1	\$ 0.41	0.41
2 OPERATIONS COST	2	\$ 0.50	1.00
3 FACILITY COST	1	\$ 0.50	0.50
TOTAL			2.91

Account Number	Account Description	Amount
01-1000-01-000	Operating Cash Account	

**Tip:** Privileged users such as Workflow Admins or Workflow Super Users, can view group-owned Workflow items without ownership transfer and restrictions. If they are also a group member then normal group member restrictions apply.

## Workflow Item Tracking Panel

This panel displays the **Workflow Conversation** and **Workflow item history** where Workflow Conversation captures the comments entered on executing the Workflow events such as Approve or Reject, and Workflow item History captures the Workflow item information such as previous owner, current owner, changed by, changed on date etc.

Watch the [video](#) to learn about the Workflow Item Tracking panel.

In the bottom-left corner of the screen, Click on the Workflow item Tracking panel icon  to access the Workflow Conversation and Workflow item History.

The screenshot displays a software interface for viewing an invoice. The main content area shows the invoice details, including the sender and recipient addresses, order information, and a table of items. A red callout box highlights the 'Workflow Item Tracking Panel' icon in the left sidebar.

**Address:** Floor 100, 100 Main Street  
G.P.O. Box 100, Globecity Globeland, 1000  
Telephone: (01) 9999 9999  
Fax : (01) 9999 8888

**SOLD TO:** Mr. Graham H. Smith  
12 South Road  
Globecity East  
Globeland 1001

**SHIP TO:** Mr. Christopher Jones  
254 East Road  
Globecity East  
Globeland 1001

(SAME AS SOLD TO UNLESS OTHERWISE INDICATED)

OUR ORDER	YOUR ORDER	FREIGHT COMPANY	FREIGHT METHOD	SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
127-96	98750-96	Speed Transport	Road	95643	26/02/2001	1 of 2	859652

QUANTITY	SHIP	PART or MODEL NUMBER	DESCRIPTION	LIST PRICE	NET UNIT PRICE	AMOUNT
10	10	APIAPT103	Bamboo Blinds	1020.00	1020.00	10200.00
50	50	APIAT1C38	Writing Sets	200.50	200.50	10025.00
		1C39	Umbrellas	30.00	30.00	2400.00
		1C72	Cane Chair	693.20	693.20	5545.60
		1C78	Cane Baskets	50.00	50.00	300.00
4	4	APIAPT103	Tea Chests	799.00	799.00	3196.00
2	2	APIAT1C38	Writing Desk	2600.00	2600.00	5200.00
100	100	APIAT1C39	Oriental Rug	65.00	65.00	6500.00
13	13	APIAT1C72	Chinese Wall Hangings	102.00	102.00	2214.00

**Document Profile:**

Vendor: New World Company  
Invoice Date: 02/28/2010  
Invoice Amount: \$200,000.00  
Invoice Number: 859652  
PO Number: 100  
Invoice Description: Enter Value  
Remit To ID: Enter the value

**Distribution:**

Account Number	Reference
999-9999-99	

## Workflow Conversation Panel

Under Workflow conversation panel, the Workflow events like accept, keyed or reject can be viewed. When the user enters a comment at the time of the executing an event, then the comment is added to the Workflow conversation.

Click on "**Workflow item Tracking panel**" icon in the Workflow item viewer to open the Workflow Conversation panel as shown in below screen.

The screenshot displays a software interface with three main sections:

- Workflow Conversation (Left Panel):** Contains two messages: "looks fine" and "Submitting the Invoice.", both dated 08/13/2019 04:29 AM and 04:41 AM respectively, sent by Vivek Soni.
- Invoice Preview (Center):** Shows a "SHIP TO" address: Mr. Christopher Jones, 254 East Road, Globecity East, Globeland 1001. Below this is a table with invoice details:
 

SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
95643	26/02/2001	1 of 2	859652

 A second table lists line items:
 

LIST PRICE	NET UNIT PRICE	AMOUNT
1020.00	1020.00	10200.00
200.50	200.50	10025.00
30.00	30.00	2400.00
693.20	693.20	5545.60
50.00	50.00	300.00
799.00	799.00	3196.00
2600.00	2600.00	5200.00
65.00	65.00	6500.00
102.00	102.00	2216.00
- Document Profile (Right Panel):** Shows metadata for ID: 431618 | Step: Import Issues | Owner: Vivek Soni. Fields include Vendor (New World Company), Invoice Date (02/28/2010), Invoice Amount (\$200,000.00), Invoice Number (859652), PO Number (100), and Invoice Description (Enter Value). A "Distribution" section allows adding or deleting account numbers, with one entry shown: 999-9999-99.

## Workflow Item History

When any Workflow item moves from one step to another, then the changes of the Workflow item such as previous step, Next step etc. are captured in the Workflow Item history. Thus, the details about the changes applied on the Workflow item can be viewed under Workflow history.

Click on Workflow Item Tracking panel icon in the Workflow item viewer to view the details of Workflow item. Now, Click "**Workflow Item History**" tab.

The screenshot displays a software interface with three main sections:

- Workflow Item History (Left Panel):** A table listing workflow steps and their details.
 

Step	Details
Previous Step	AP_Review
New Step	Import_Issues
Changed By	Vivek Soni
Changed On	08/13/2019 04:41 AM
Previous Owner	Vivek Soni
Current Owner	Vivek Soni
Comment	Submitting the Invoice.
Approve	
Previous Step	Keying
New Step	AP_Review
Changed By	Vivek Soni
Changed On	08/13/2019 04:29 AM
Previous Owner	Vivek Soni
Current Owner	Vivek Soni
Comment	looks fine
Delay	
Previous Step	Keying
New Step	PaperSave System
Changed By	PaperSave System
Changed On	08/07/2019 06:22 AM
Previous Owner	
Current Owner	
Comment	
- Invoice Preview (Center):** Shows shipping information and a table of items.
 

SHIP TO:  
Mr. Christopher Jones  
254 East Road  
Globecity East  
Globeland 1001

SALES TAX EXEMPT	INVOICE DATE	PAGE	INVOICE No.
95643	26/02/2001	1 of 2	859652
LIST PRICE	NET UNIT PRICE	AMOUNT	
1020.00	1020.00	10200.00	
200.50	200.50	10025.00	
30.00	30.00	2400.00	
693.20	693.20	5545.60	
50.00	50.00	300.00	
799.00	799.00	3196.00	
2600.00	2600.00	5200.00	
65.00	65.00	6500.00	
- Document Profile (Right Panel):** Contains metadata for the document.
 

ID: 431618 | Step: Import Issues | Owner: Vivek Soni

Vendor: New World Company | Invoice Date: 02/28/2010

Invoice Amount: \$200,000.00 | Invoice Number: 859652

PO Number: 100 | Invoice Description: Enter Value

Remit To ID: Enter the value

Distribution: Add, Delete, Account Number, Reference

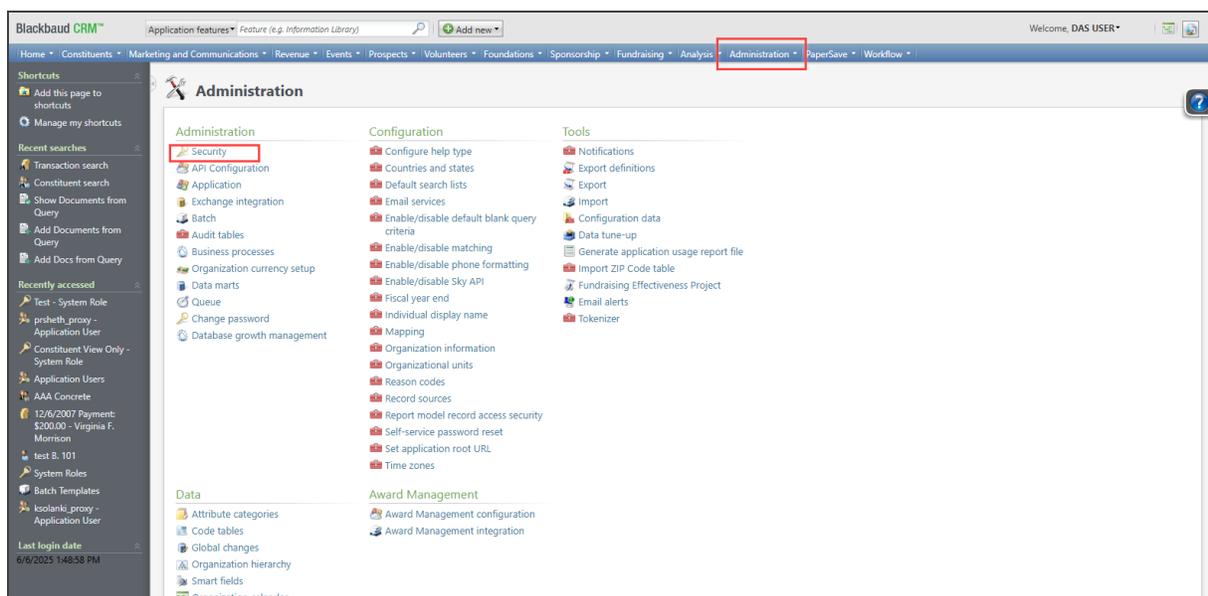
Workflow item history contains the below information regarding the changes for a Workflow item:

- **Previous Step:** This field describes the Workflow step before the change of step in the Workflow item.
- **Next Step:** This field describes the Workflow step after the change of step in the Workflow item.
- **Changed By:** This field describes the details of the user responsible for change of step in the Workflow item.
- **Changed on:** This field describes the date and time ( dd/mm/yyyy hh:mm ) for change of step in the Workflow item.
- **Previous Owner:** This field describes the user owning the Workflow item before the change of step in the Workflow item.
- **Current Owner:** This field describes the user owning the Workflow item after the change of step in the Workflow item i.e. currently owning the Workflow item.
- **Comment:** This field describes the comment entered by the Workflow step owner at the time of executing the Workflow event.

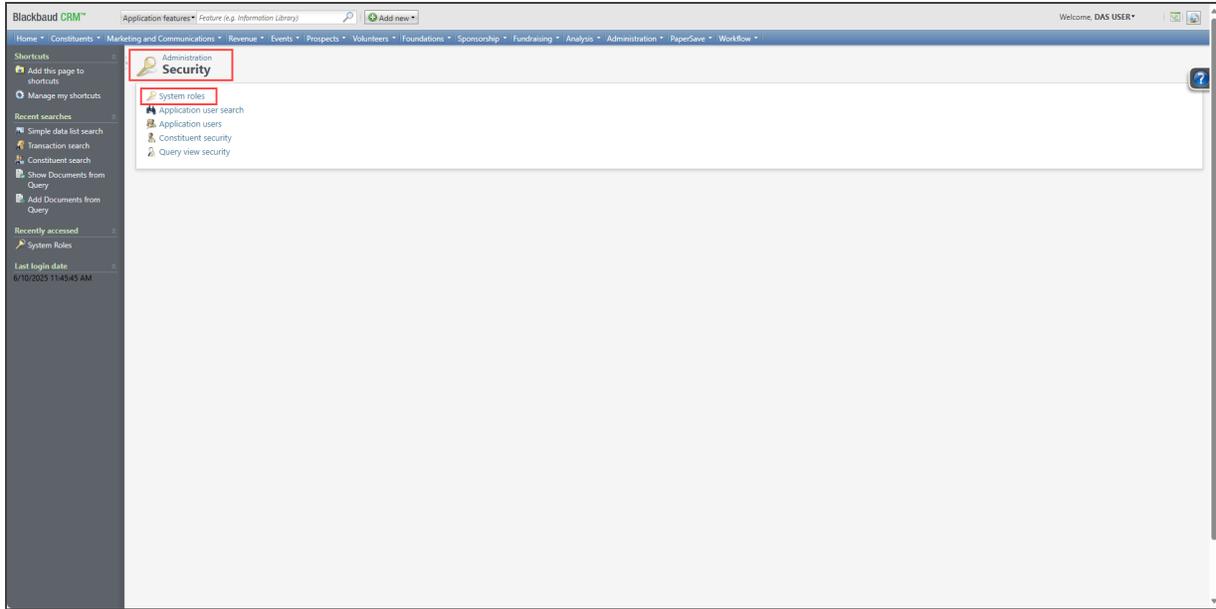
# Creating System Role for the Proxy User in Blackbaud CRM

To create system role please follow the below steps

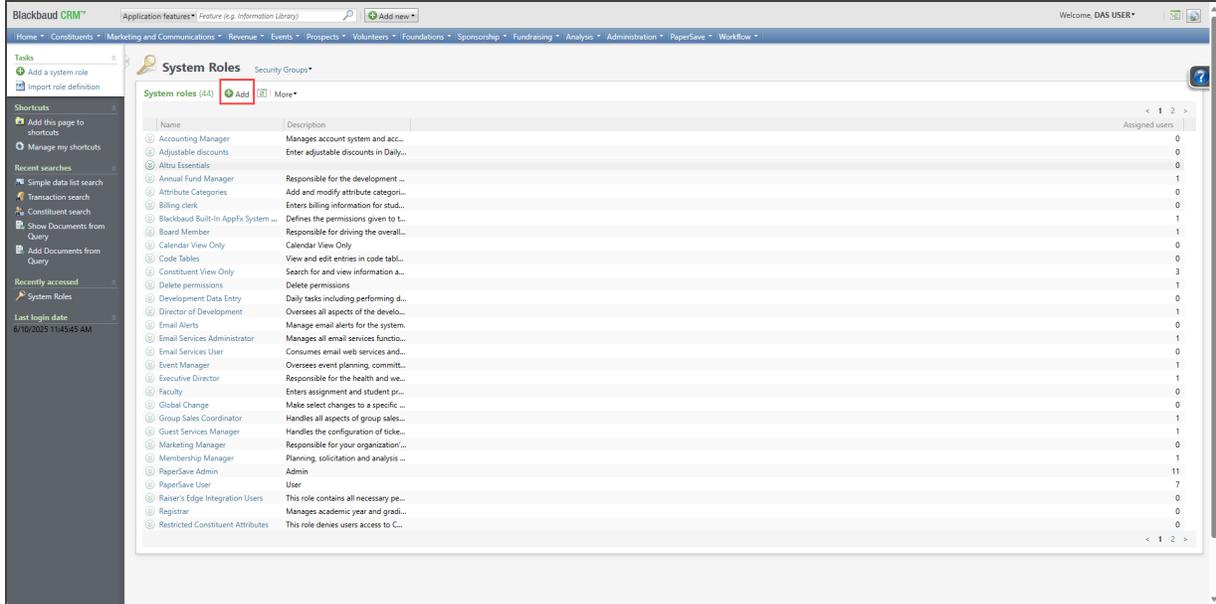
1) Open the Blackbaud CRM application, navigate to **Administration**, and select **Security**.



2) In the Security page, click on **System Roles** as shown below.

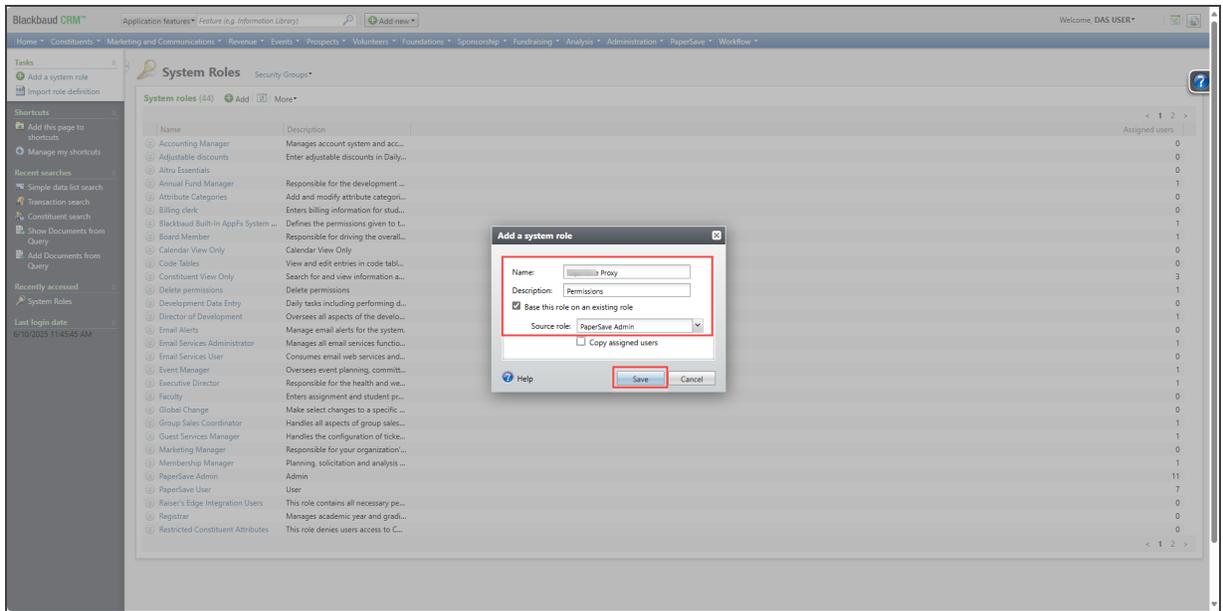


3) On the System Roles page, click on the + **Add** option as shown below.



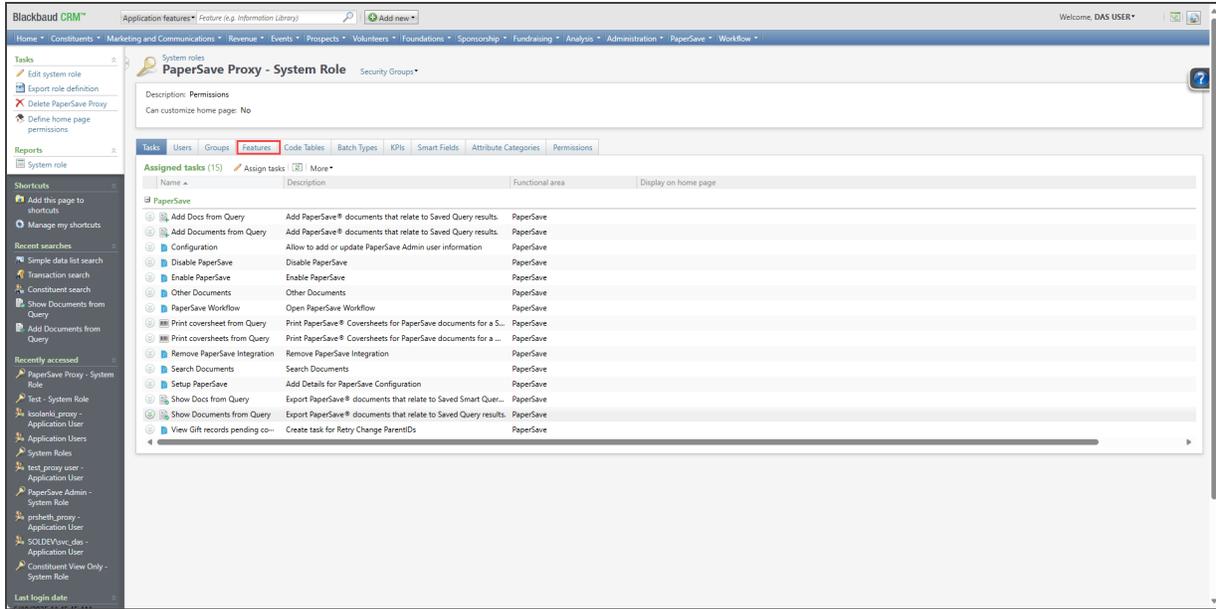
4) A confirmation dialog appears to add a system role as shown below.

- **Name:** Enter a valid name for the system role.
- **Description:** Enter a description for the system role.
- Tick the check box *"Base this role on an existing role"*.
- **Source Role:** select the **"PaperSave Admin"** from the drop-down list.

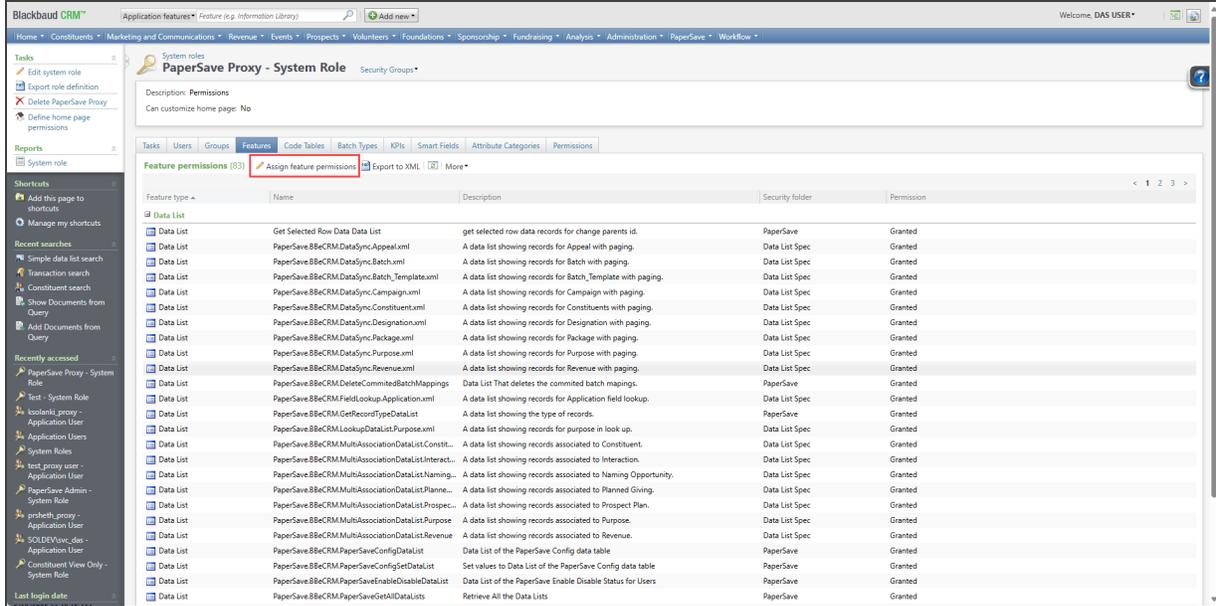


5) Now, click on the **Save** button.

6) Once saved, navigate to the **Features** tab on the system roles page as shown below.



7) Click on the "Assign feature permissions" as shown below.

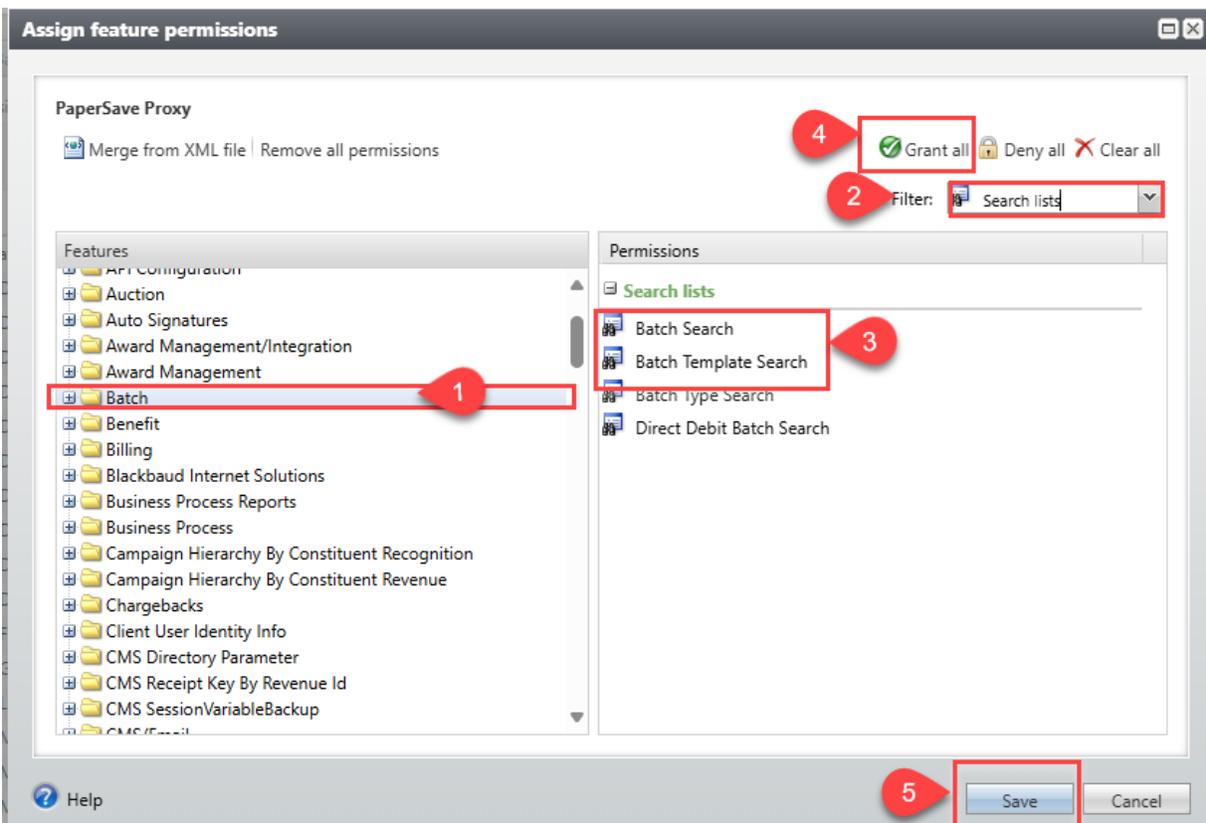


8) Now, assign the feature permissions as shown in the table below.

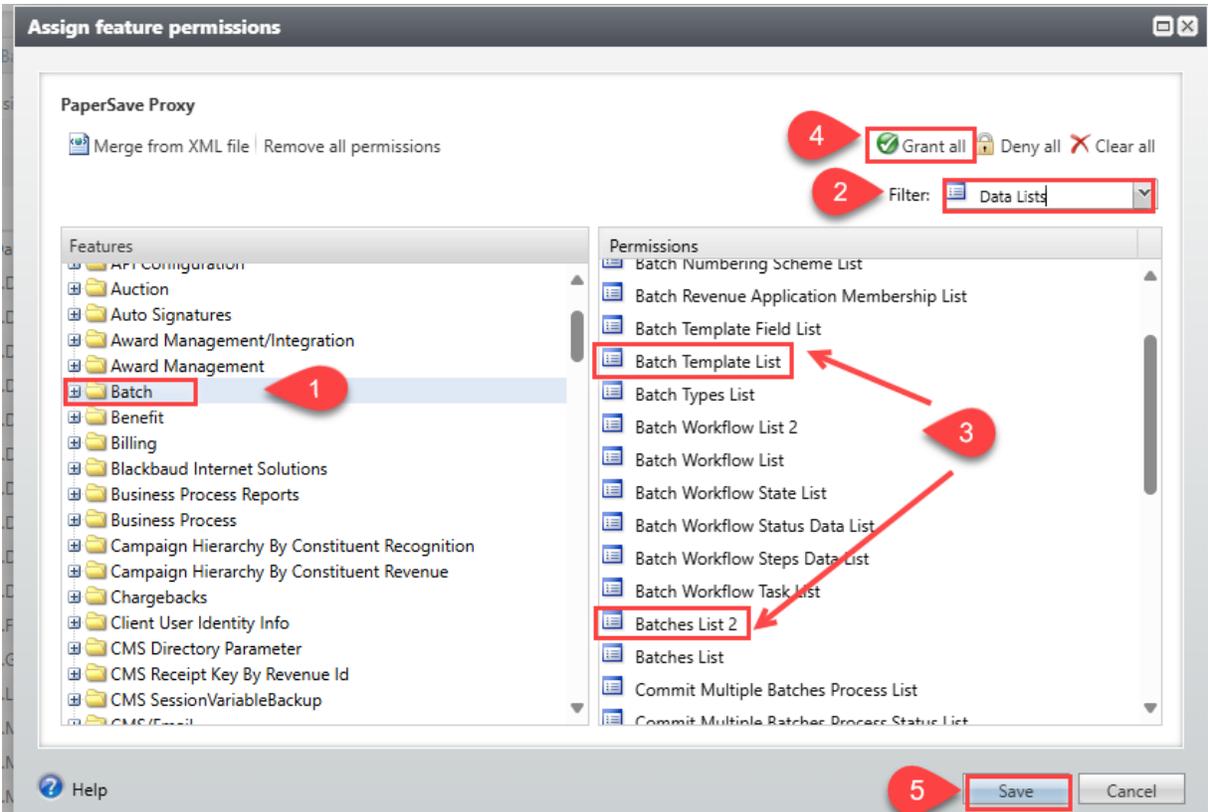
Features		Permissions	
Batch		Search Lists	Batch Search
			Batch Template Search
		Data lists	Batch Template list
			Batches List 2
		Add Forms	Batch Add Form 2
Configuration	Attributes	Data lists	Attribute category list
Constituent		Search Lists	Constituent Search
Data List Spec		Data lists	Select all the permissions that available within the list
Fundraising Efforts	Designations	Search Lists	Designation Search
Fundraising Efforts	Appeals	Search Lists	Appeal Search
Revenue		Search Lists	Revenue Search

**Note:** follow the steps sequentially mentioned in the below images

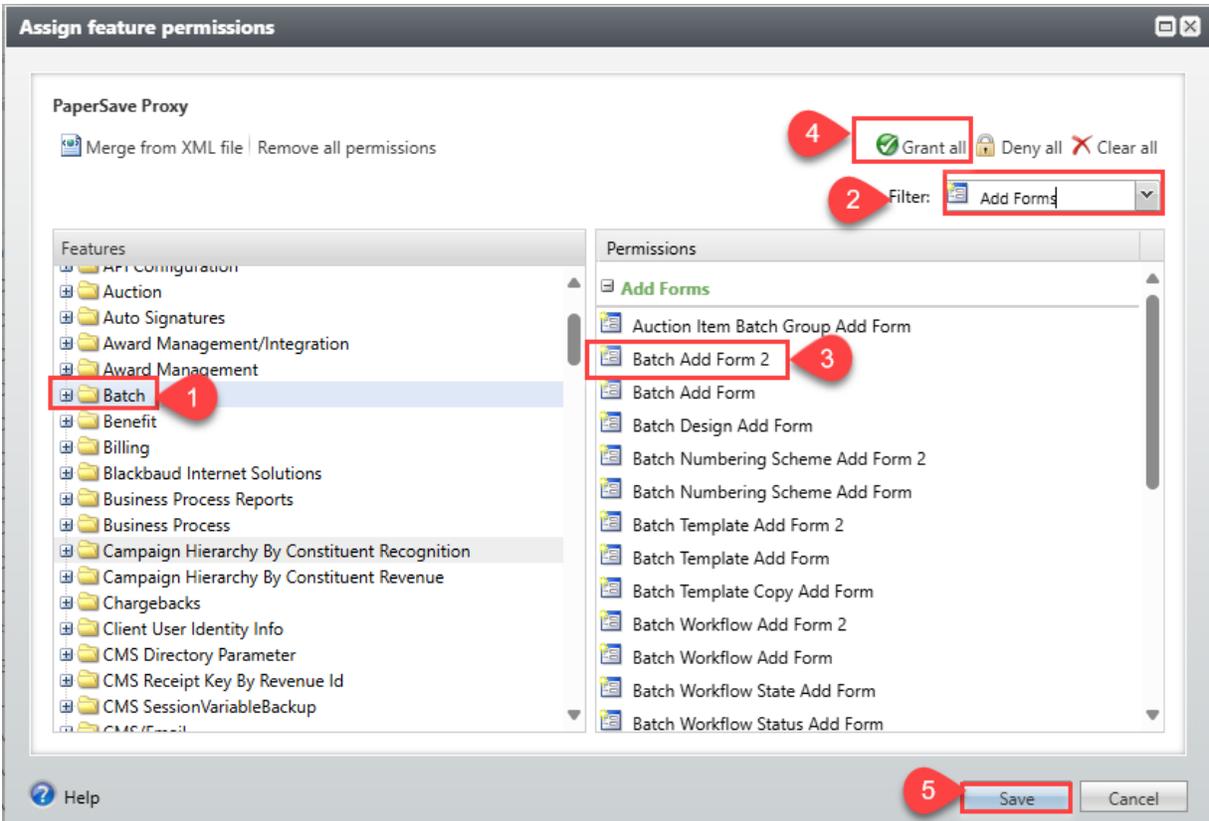
- select the Batch Search, Batch Template Search from Batch(feature) and click on the grant all and then save it.



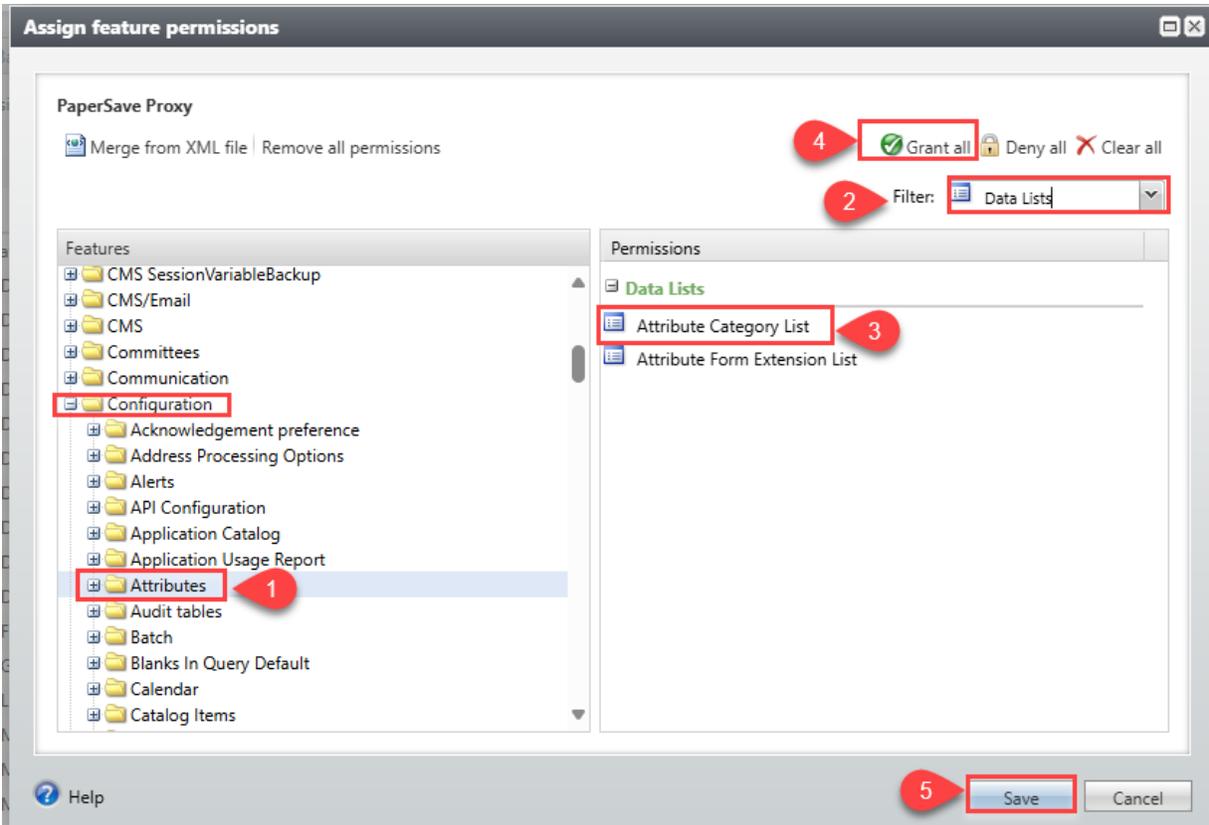
- select the Batch List 2, Batch Template List from Batch(feature) and click on the grant all and then save it.



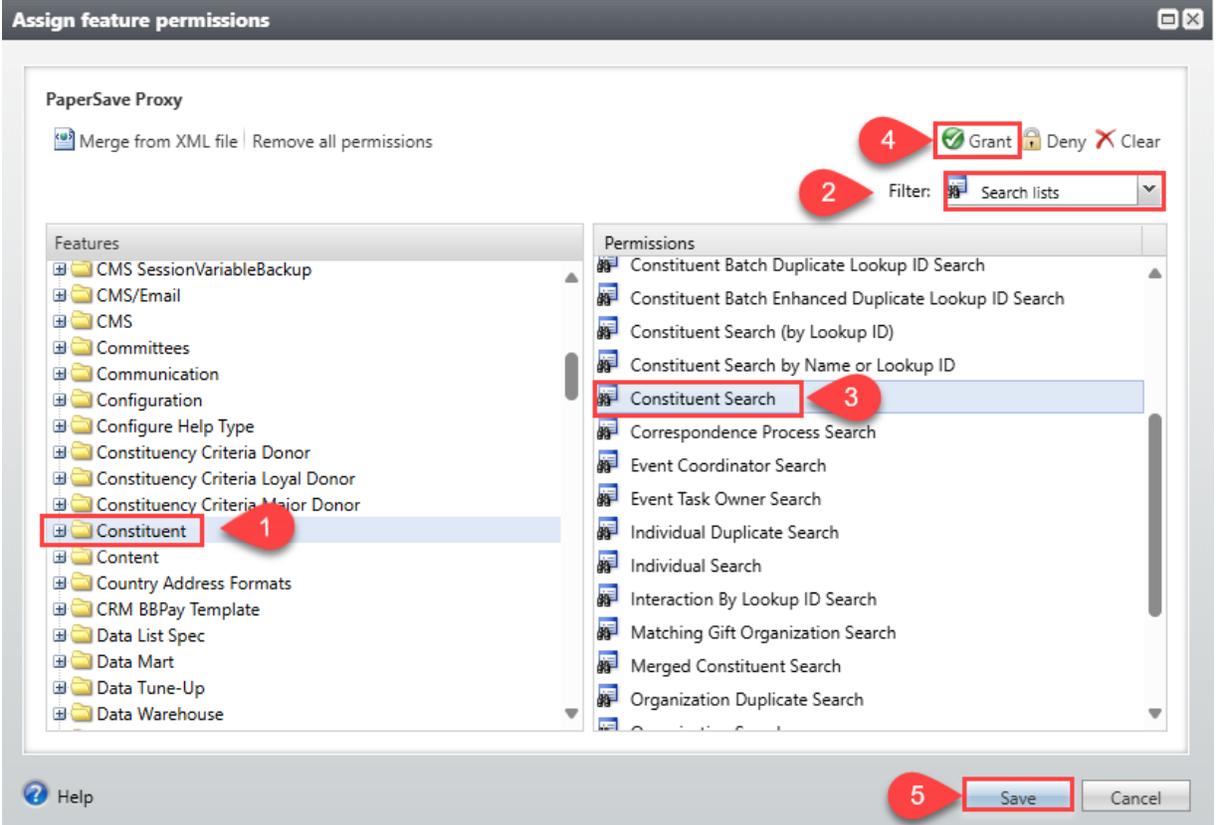
- select the Batch Add Form 2 from Batch(feature) and click on the grant all and then save it.



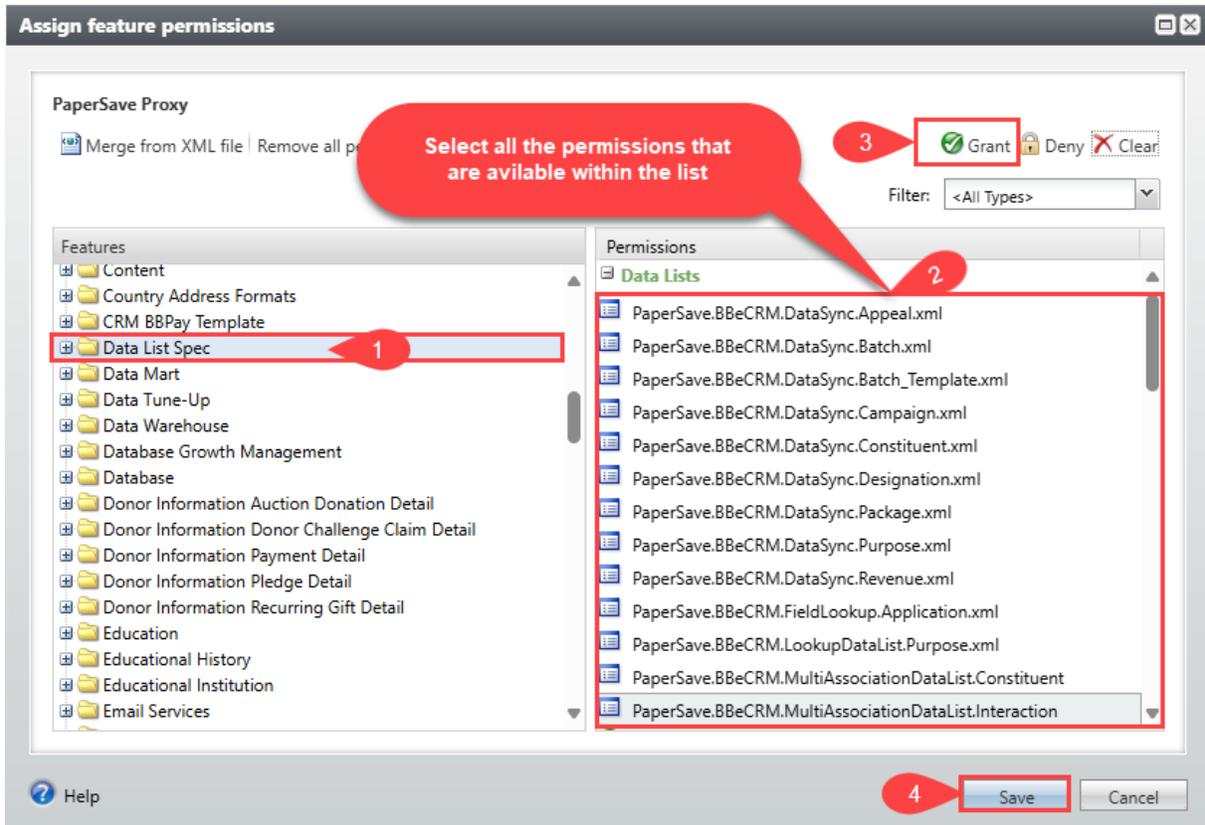
- select the Attribute category List from Attributes under the Configuration (feature) and click on Grant all and then save it.



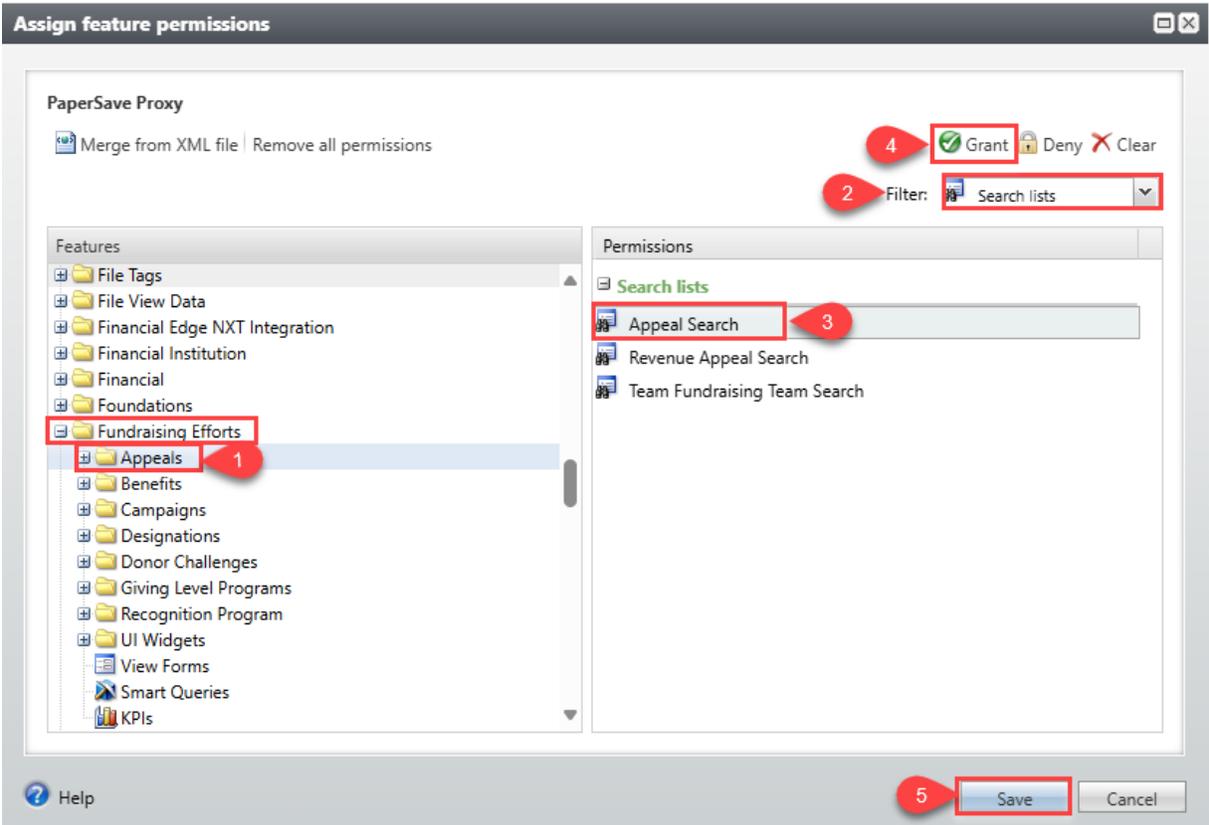
- select the Constituent Search from Constituent (feature) and click on Grant all and then save it.



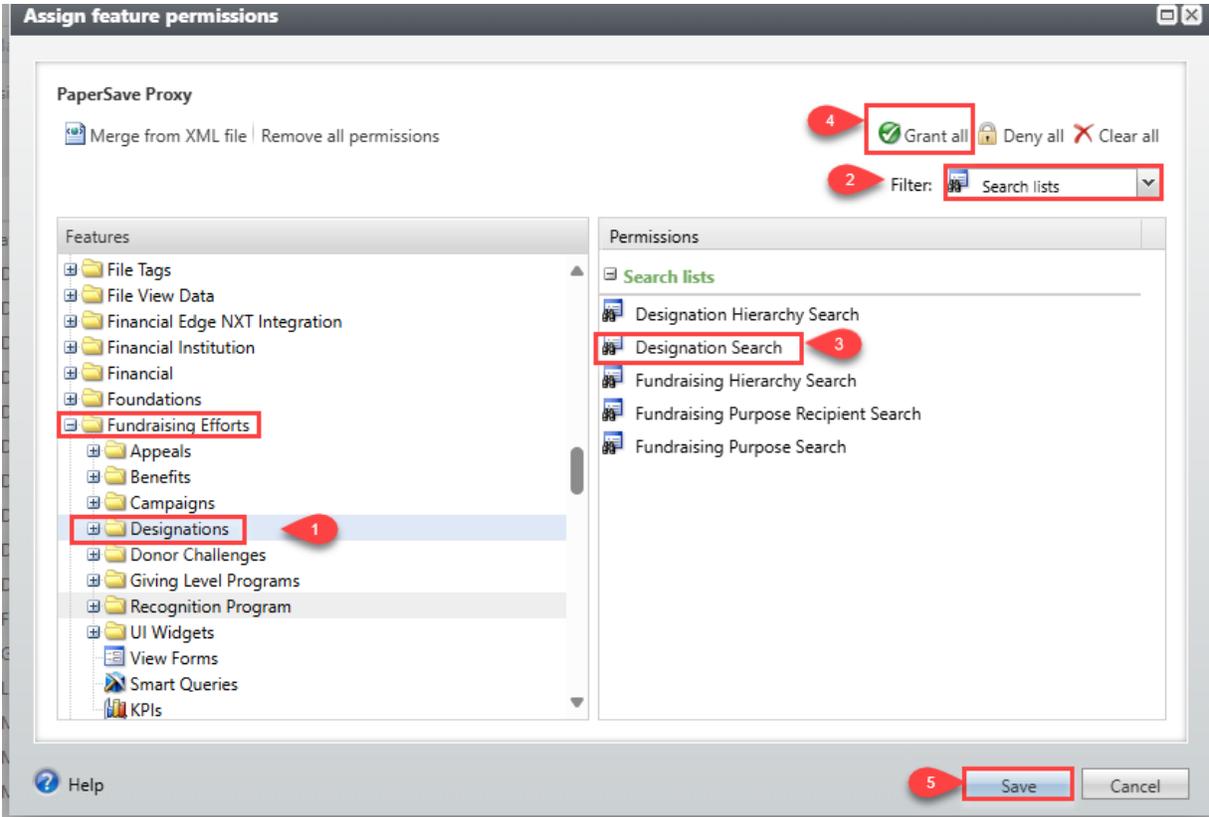
- select all the permissions that are available in the Data List Spec (feature) and click on Grant all and then save it.



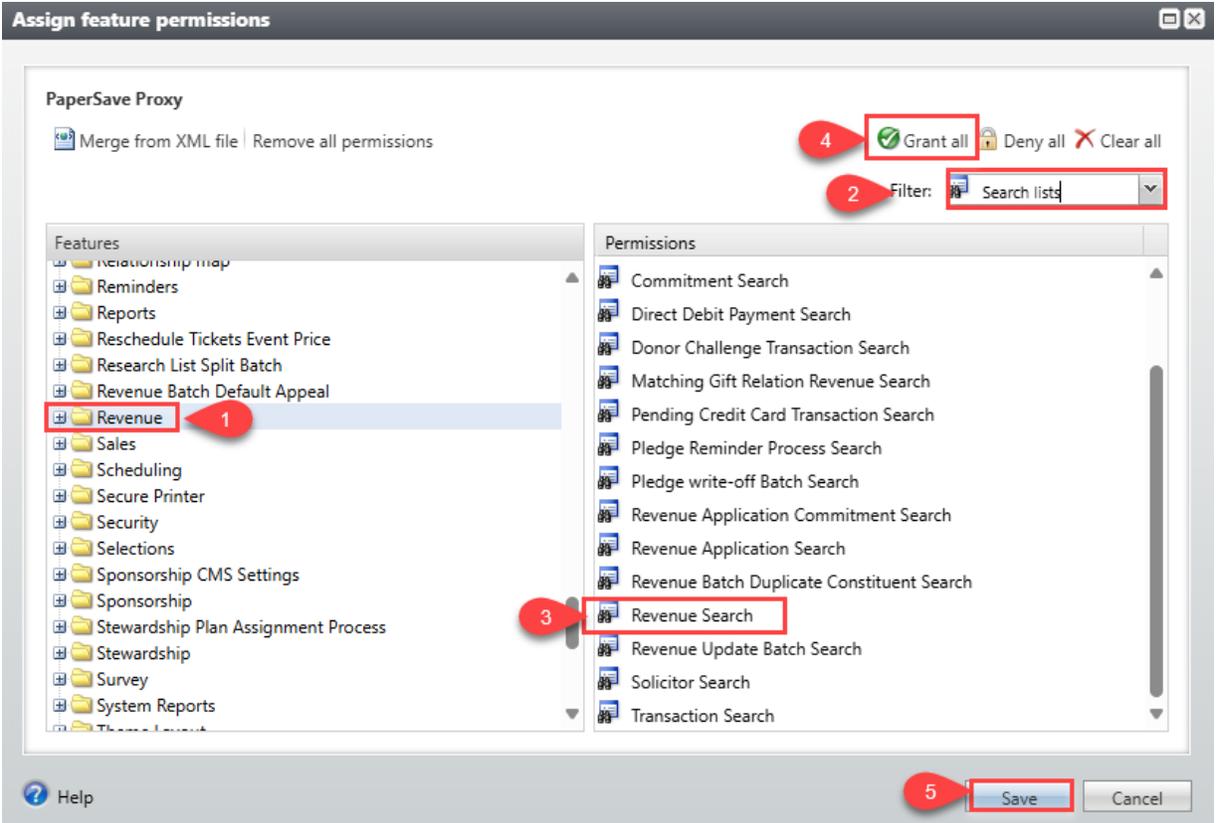
- select the Appeal Search from Appeals under the Fundraising Efforts (feature) and click on Grant all and then save it.



- select the Designation Search from Designations under the Fundraising Efforts (feature) and click on Grant all and then save it.



- select the Revenue Search from Revenue (feature) and click on Grant all and then save it.



9) Once you select the required permissions, the system role for the proxy user will be ready.