User Guide for PaperSave 7.0 for Blackbaud CRM

Index

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 ladings, 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.

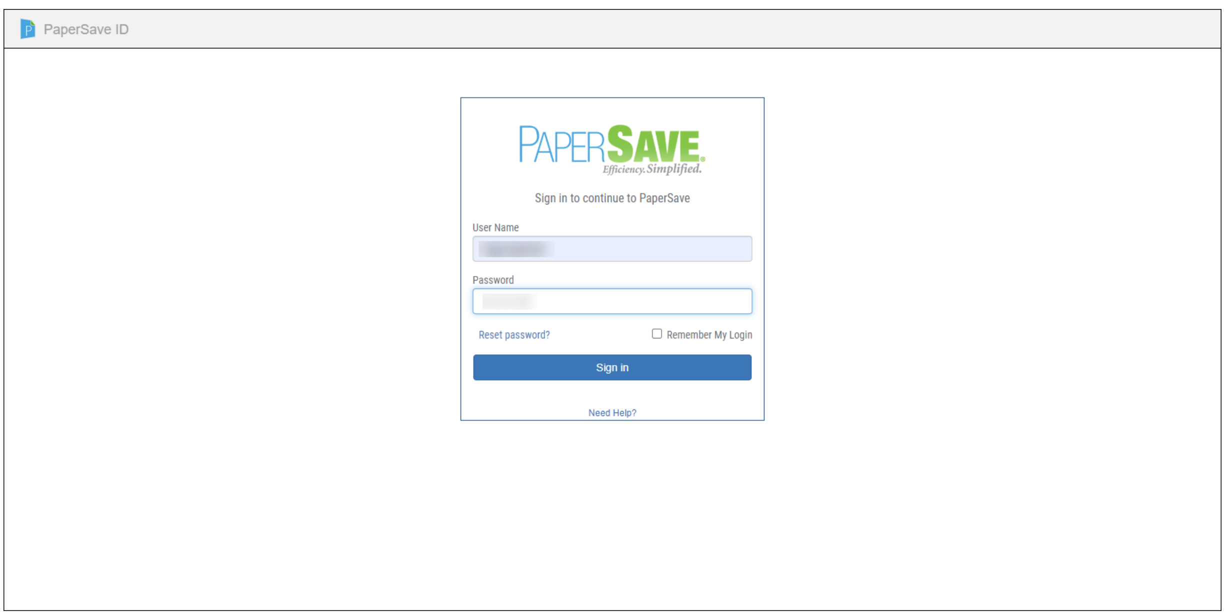
a) **User Name** - Enter your user name to log in to PaperSave.

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.



Supported Browsers and Operating Systems

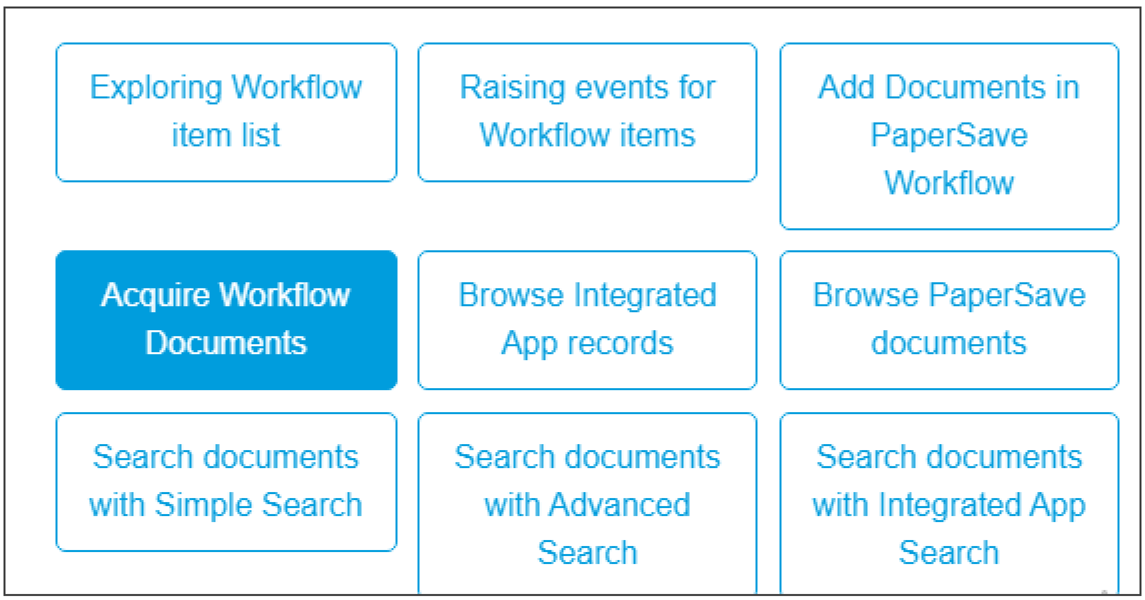
<table>
<tr><th>Supported Browsers*</th><th>Supported Operating system</th></tr>
<tr><td>Google Chrome</td><td>Windows
• Windows 8 Professional, Ultimate, Enterprise, Business (32-bit and 64-bit).
• Windows 8.1 Professional, Ultimate, Enterprise, Business (32-bit and 64-bit).
• Windows 10 (64-bit)
• Windows 11 (64-bit)
Mac
• macOS 10.14 and above</td></tr>
<tr><td colspan="2">Minimum Supported Resolution: 1600 x 900</td></tr>
<tr><td colspan="2">* 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.</td></tr>
</table>

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.

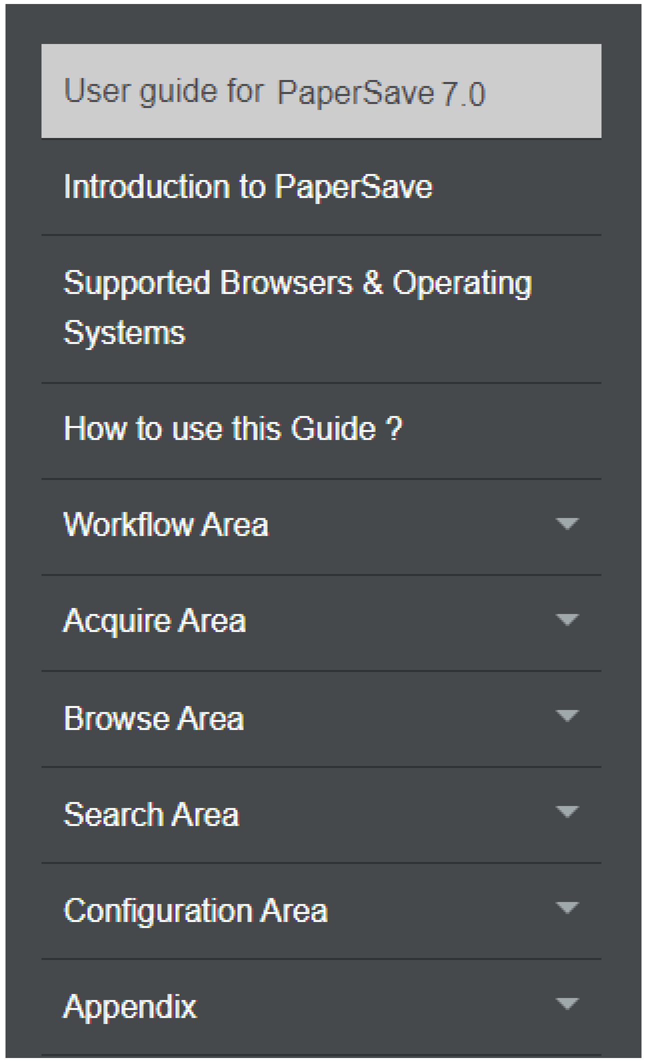
Home page Quick Links

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

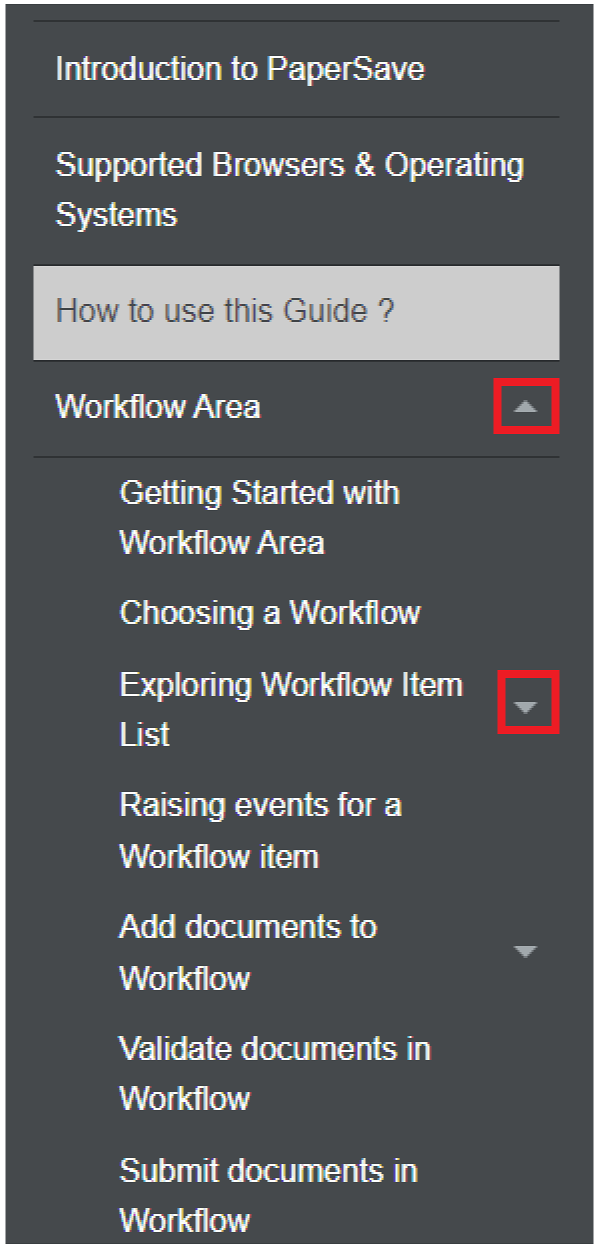


User Guide Navigation Menu

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



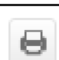
- Explore the Sub-topics within the main topics using Arrows as shown in the below screen. Click on the **Up** arrow to collapse the sub-topics and the**Down** arrow to expand the sub-topics.



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
PDF Guide	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

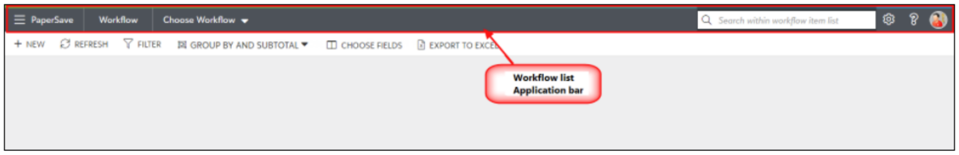
Access the sub-topics under the selected main topic in the User Guide from the breadcrumbs menu as shown in the below screen:

PDF Guide

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:

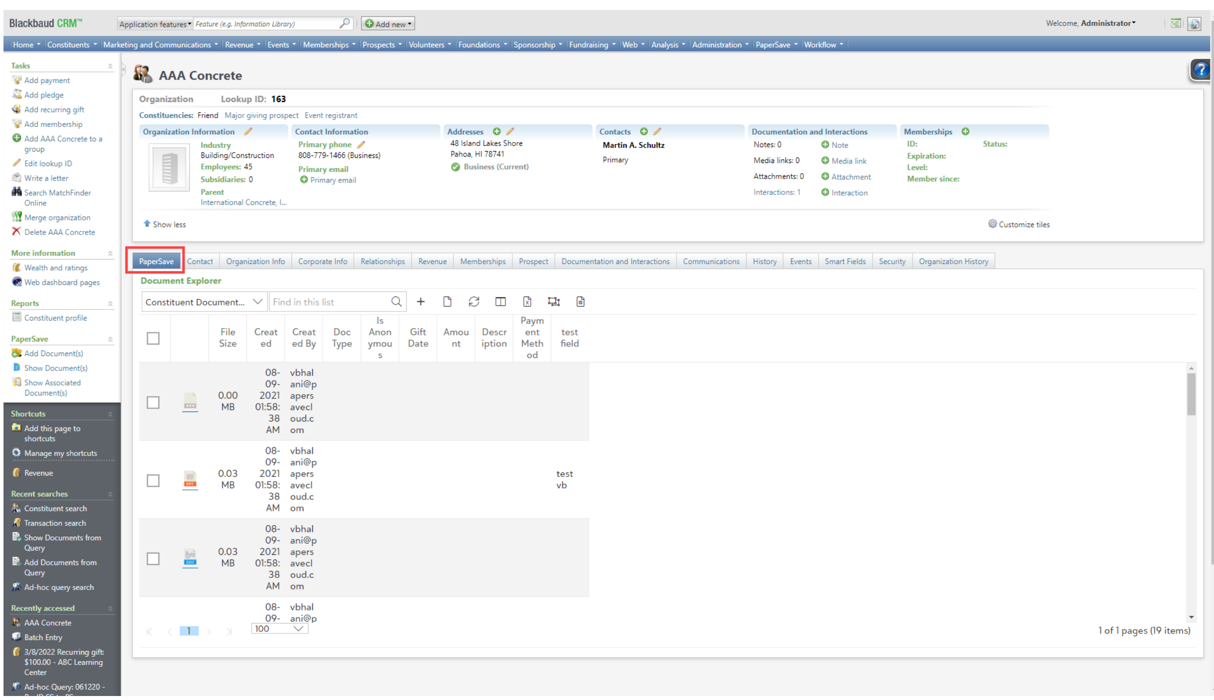


PaperSave Integration within Blackbaud CRM

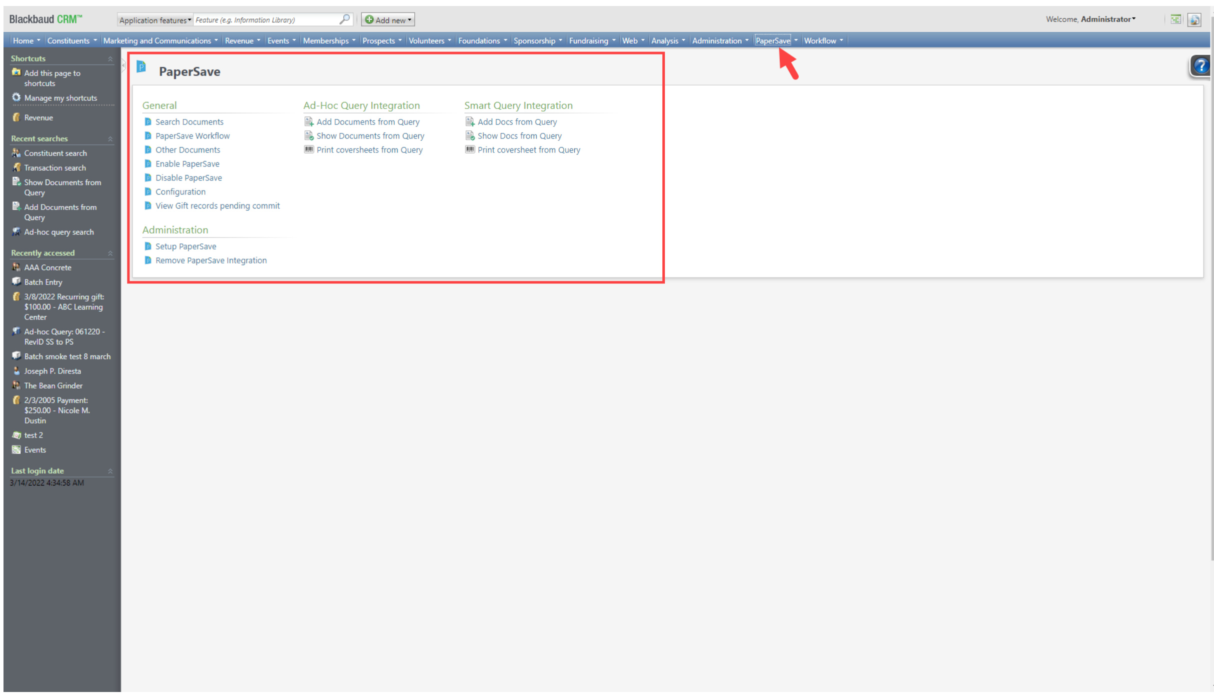
PaperSave offers an integrated document management solution seamlessly integrated with the Blackbaud CRM so that documents can be electronically added and retrieved by while eliminating time from your busy workday. PaperSave dynamically captures information from the supporting CRM record types and stores 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:

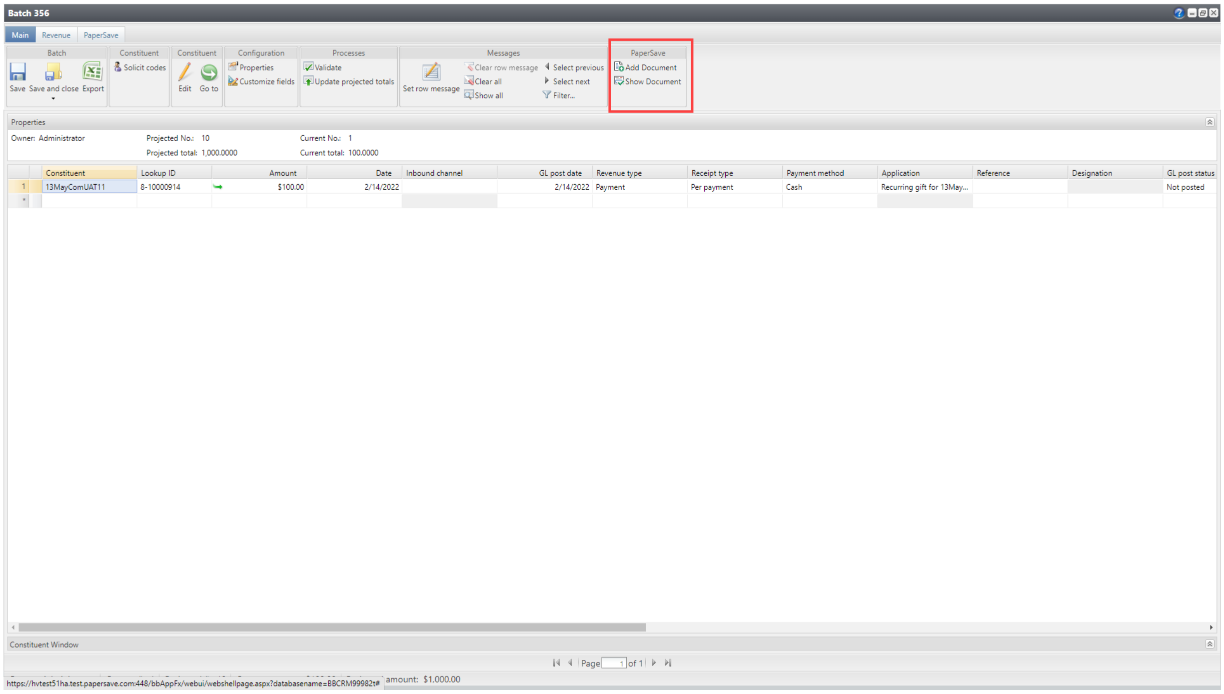
PaperSave Minified Document Explorer: When you open any record within the PaperSave supported record type, PaperSave tab appears as shown below. Click here to know more.

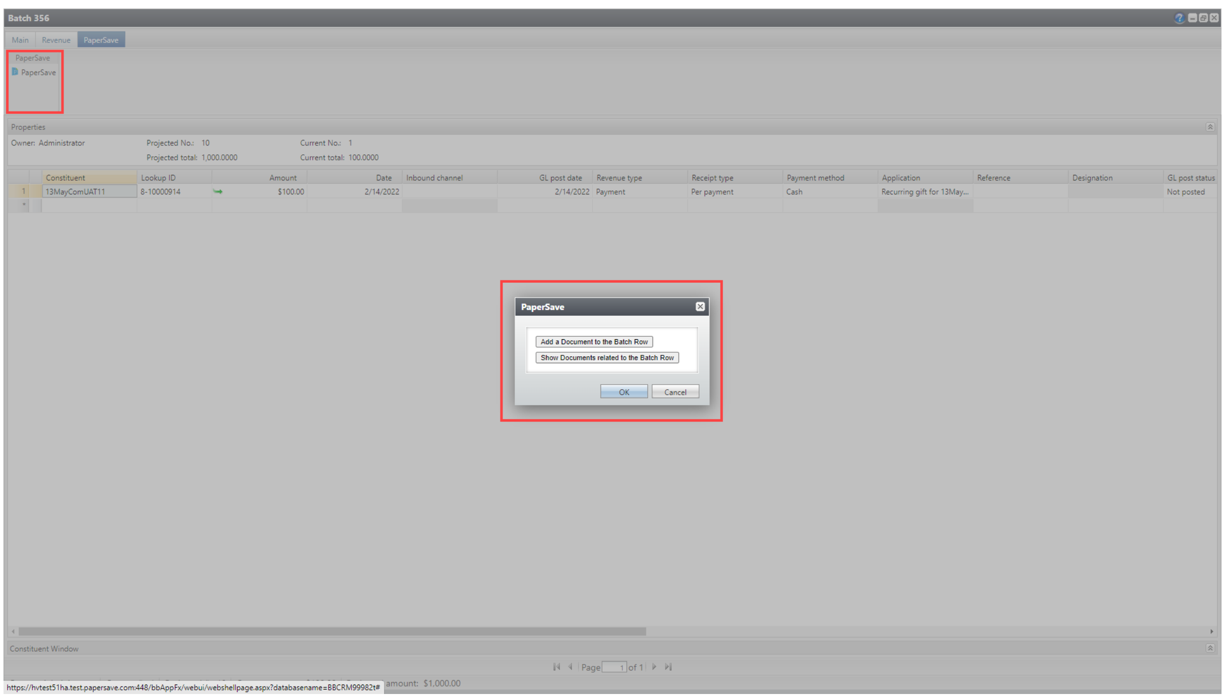


PaperSave Customized Menu within Blackbaud CRM: In Blackbaud CRM, a separate PaperSave section is available as shown below which consist of various PaperSave options such as Enable/Disable PaperSave, Add/Show/Print Coversheets from Query, Setup PaperSave, Remove PaperSave integration, etc. Click [here]()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

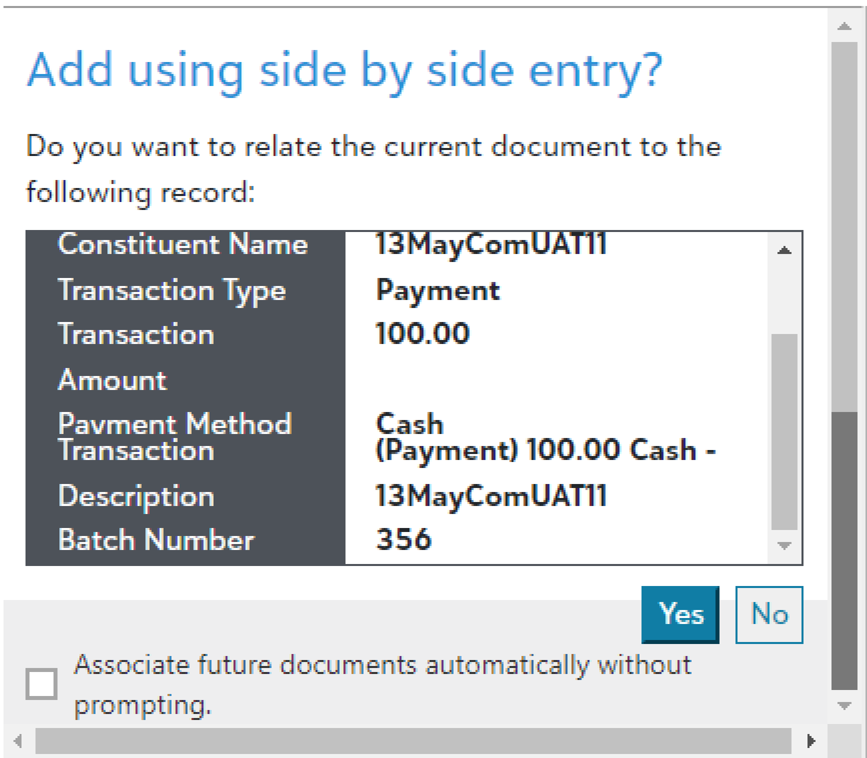


Batch Integration plug-in for Blackbaud CRM: To add PaperSave add and show document option within Revenue batch, PaperSave provides you a plug-in which on enabling you can access PaperSave's option from the action pane of the uncommitted batch dialog box and from PaperSave tab which open the dialog box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


Batch 356
Main
Revenue
PaperSave
Save
Save and close
Export
Solicit codes
Edit
Go to
Properties
Customize fields
Validate
Update projected totals
Set row message
Clear row message
Clear all
Show all
Select previous
Select next
Filter...
Add Document
Show Document
Properties
Owner: Administrator
Projected No.: 10
Projected total: 1,000.0000
Current No.: 1
Current total: 100.0000
Constituent
Lookup ID
Amount
Date
Inbound channel
GL post date
Revenue type
Receipt type
Payment method
Application
Reference
Designation
GL post status
13MayComUAT11
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
amount: $1,000.00


Batch 356
Main
Revenue
PaperSave
PaperSave
PaperSave
PaperSave
Add a Document to the Batch Row
Show Documents related to the Batch Row
OK
Cancel
Constituent Window
amount: $1,000.00

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.

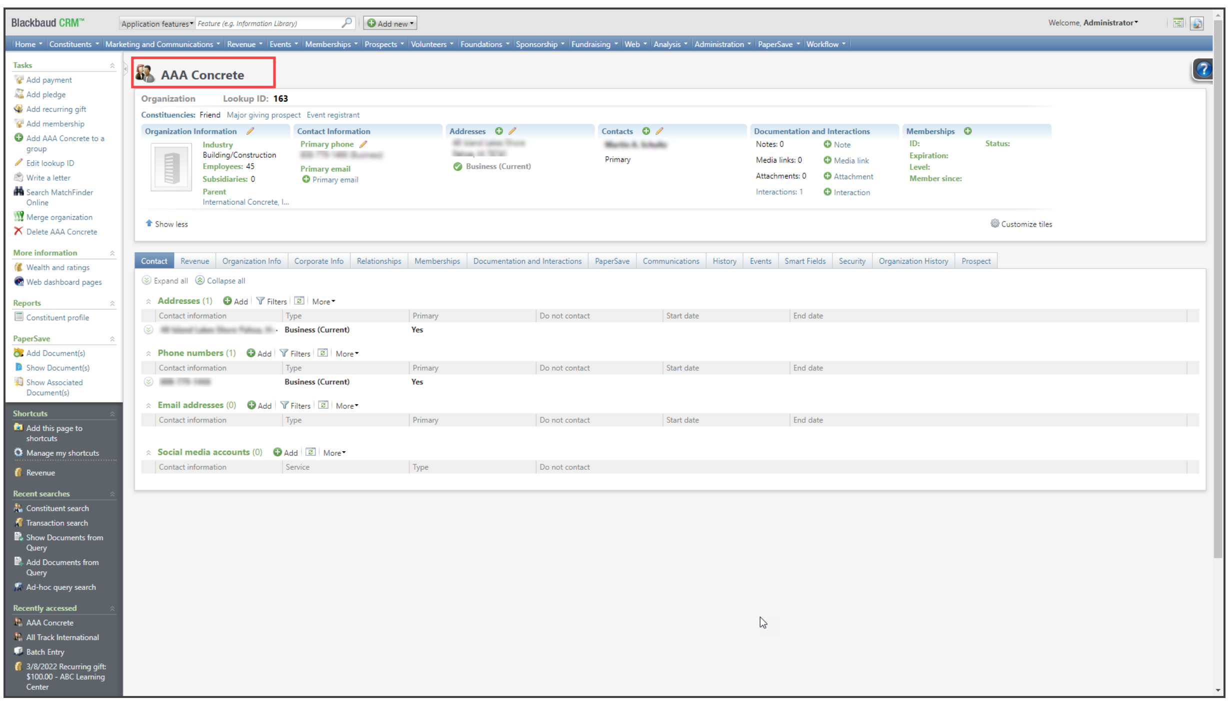
Click [here]() to learn more about Side by Side Entry.

Access PaperSave within PaperSave supported record types

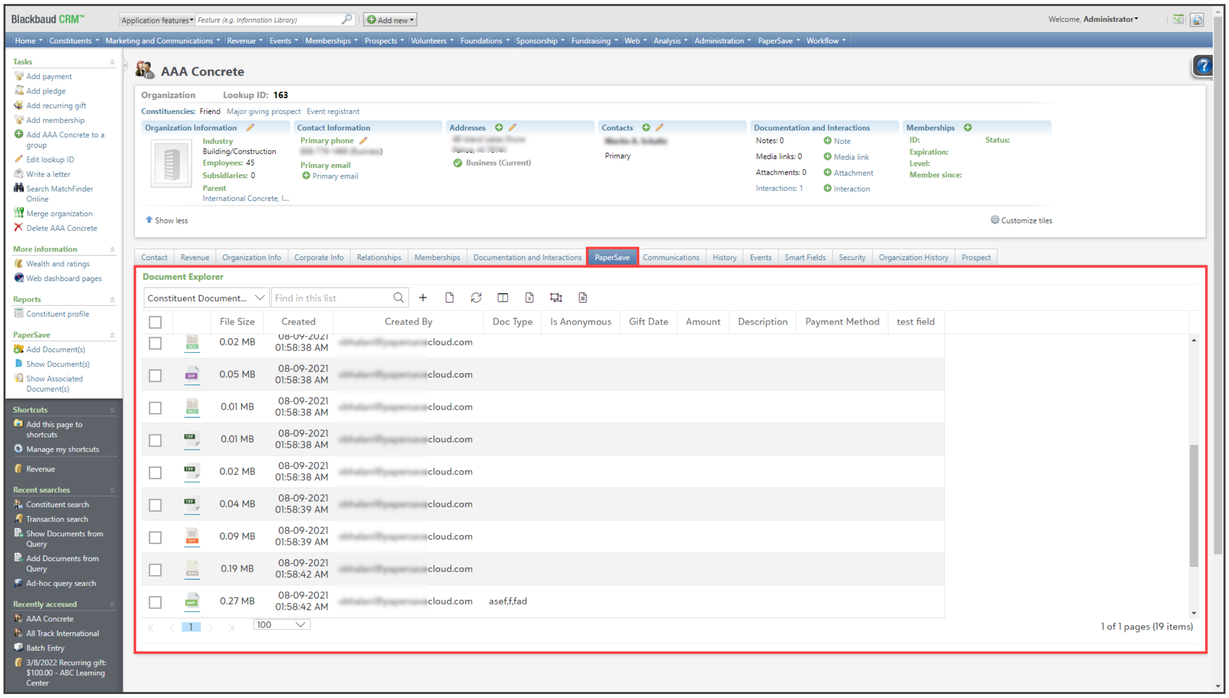
Follow the below steps to access the PaperSave within the records.

> **Note:** Click here to view the list of PaperSave supported record types.

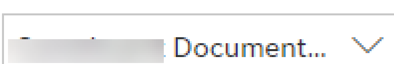
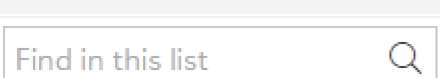
1) Login to Blackbaud CRM application, select the desired record type and open any record, as shown below.



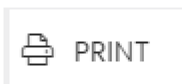
2) Once the Records page opens, click on PaperSave tab to open PaperSave minified document explorer as shown below.



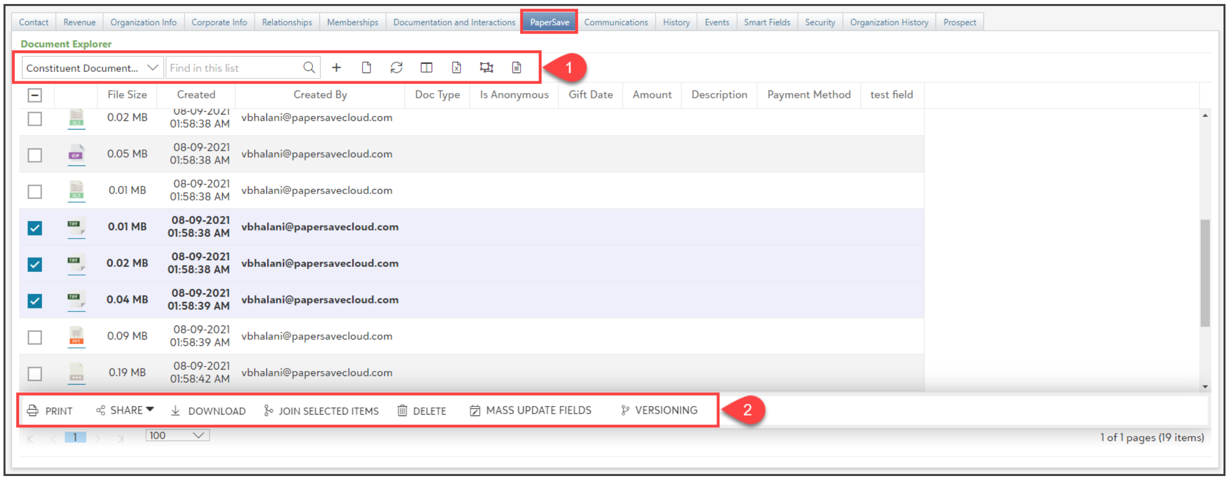
3) Now, in Document Explorer the following PaperSave options (**1- List toolbar** and **2- Slideup toolbar**) are available as shown in the following table and the image.

Options	Name	Description
1- List Toolbar		
	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 here 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 here to know more.
	Export to Excel	This option allows you to export the PaperSave document list to an excel file. click here 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.
2- Slide-up Toolbar		
	Print	This option enables you to print the selected document from the document list. Click [here](#) to know more.
	Share	You can share the selected documents from the list using any of the below options: • Email the document • Email the link of the document • Copy Link
	Download	You can download the selected documents from the list. Click [here](#) 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 here to know more.
DELETE	Delete	This option permanently discards the unnecessary document from the current list. Click here 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.

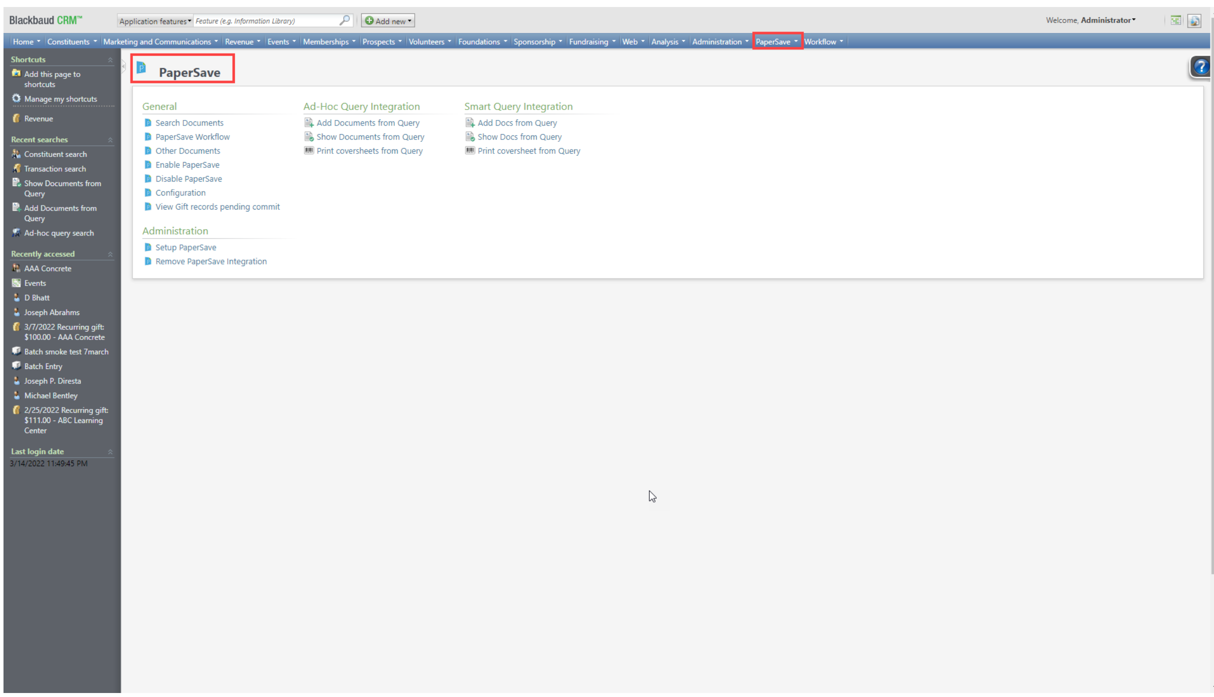


Warning: To access PaperSave options, you must first enable PaperSave from the PaperSave customized menu. Click here to view the steps to enable/disable PaperSave

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

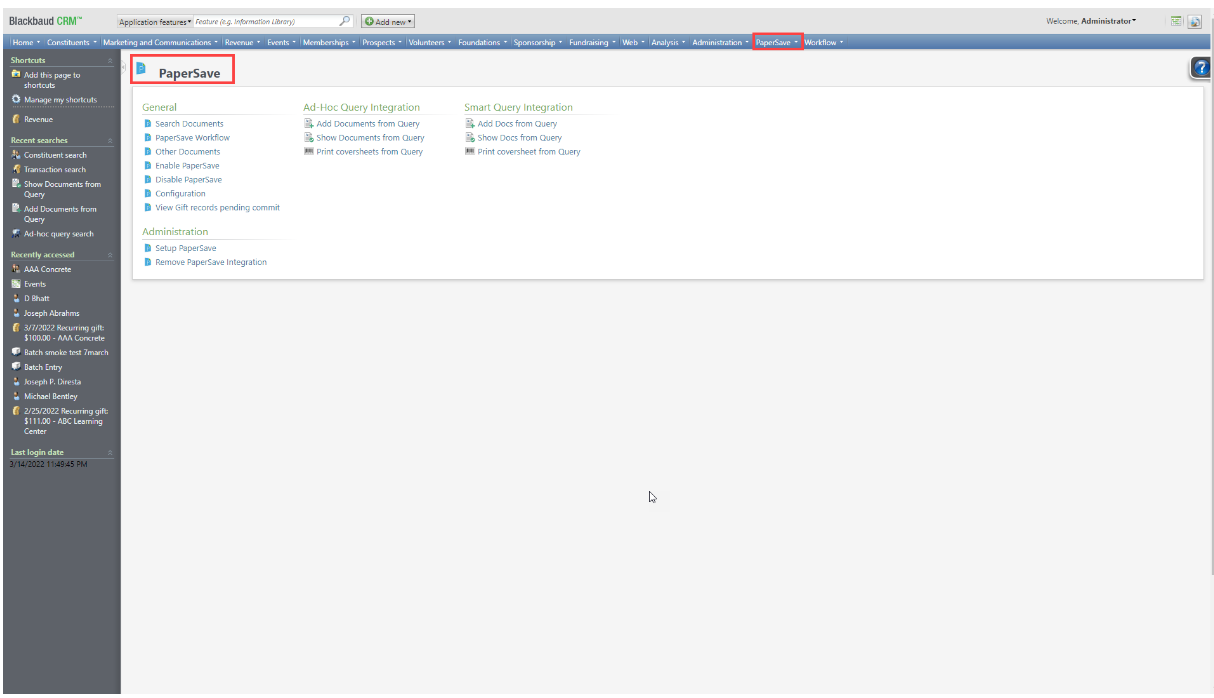
Search Documents

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

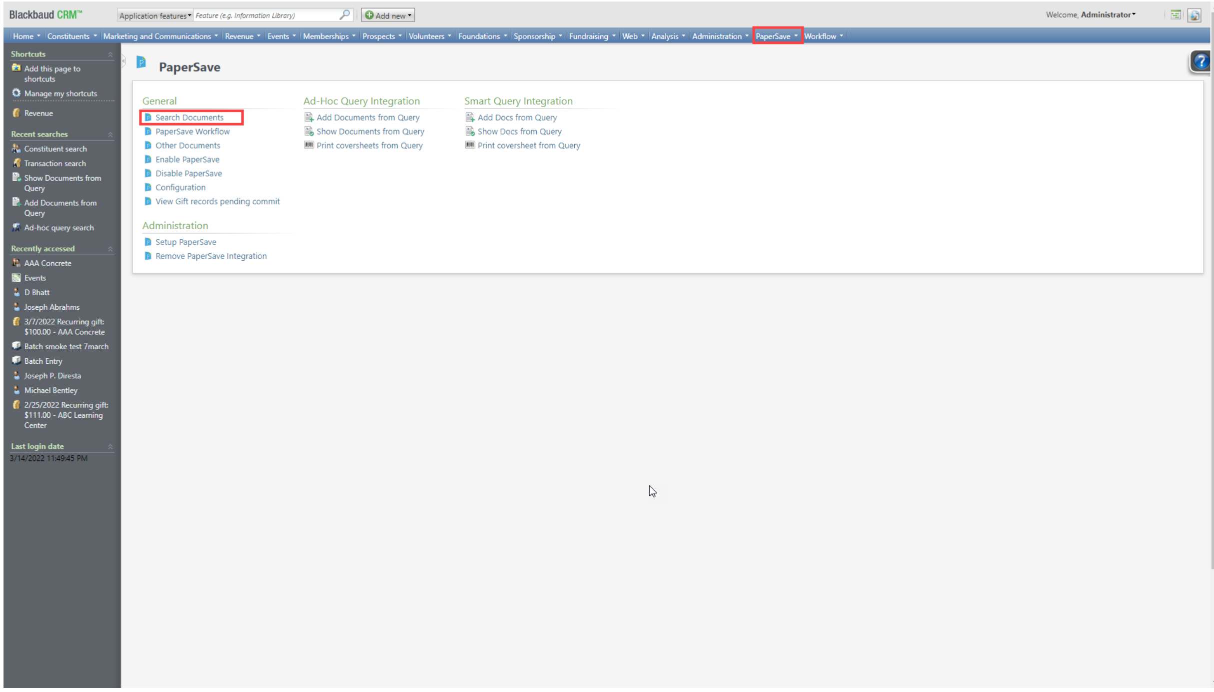
Follow the below steps to perform a search for the documents within any PaperSave supported record type.

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.

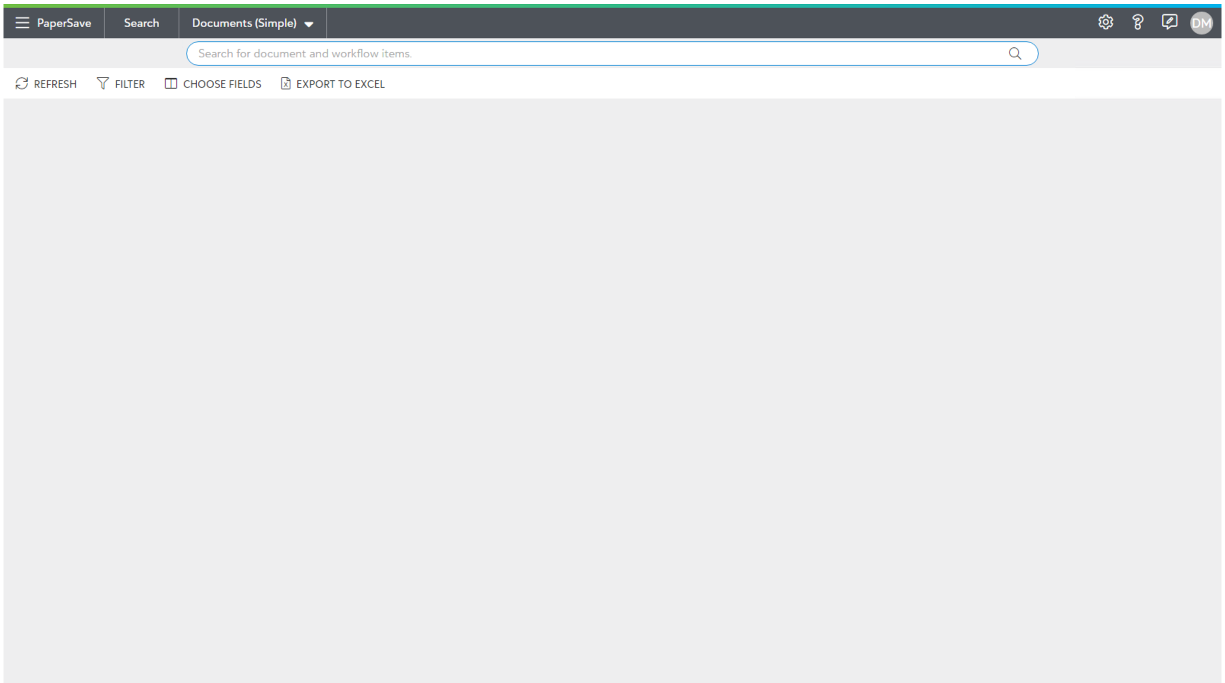


2) Now, click on the **Search Documents** option present in the General group as shown in the below screen:



> **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

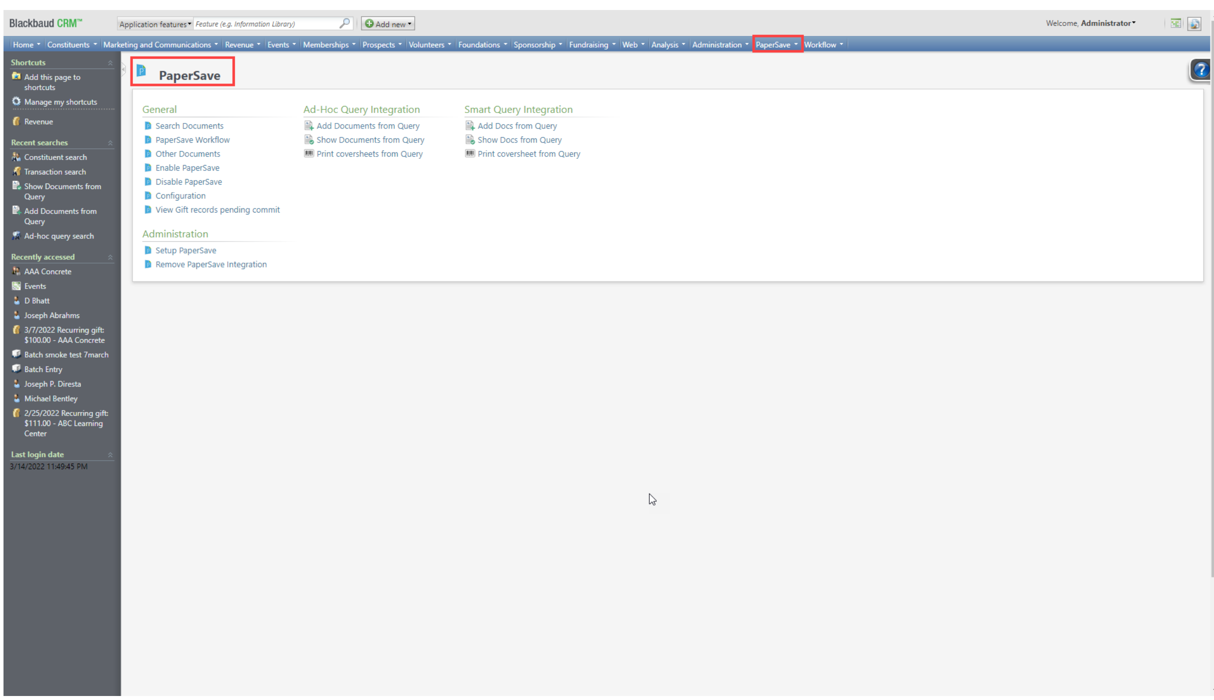
The Open Workflow option will open the Workflow Area of PaperSave in your default browser. The Workflow area is where you can perform various functions on the items in the available Workflows.

> **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.

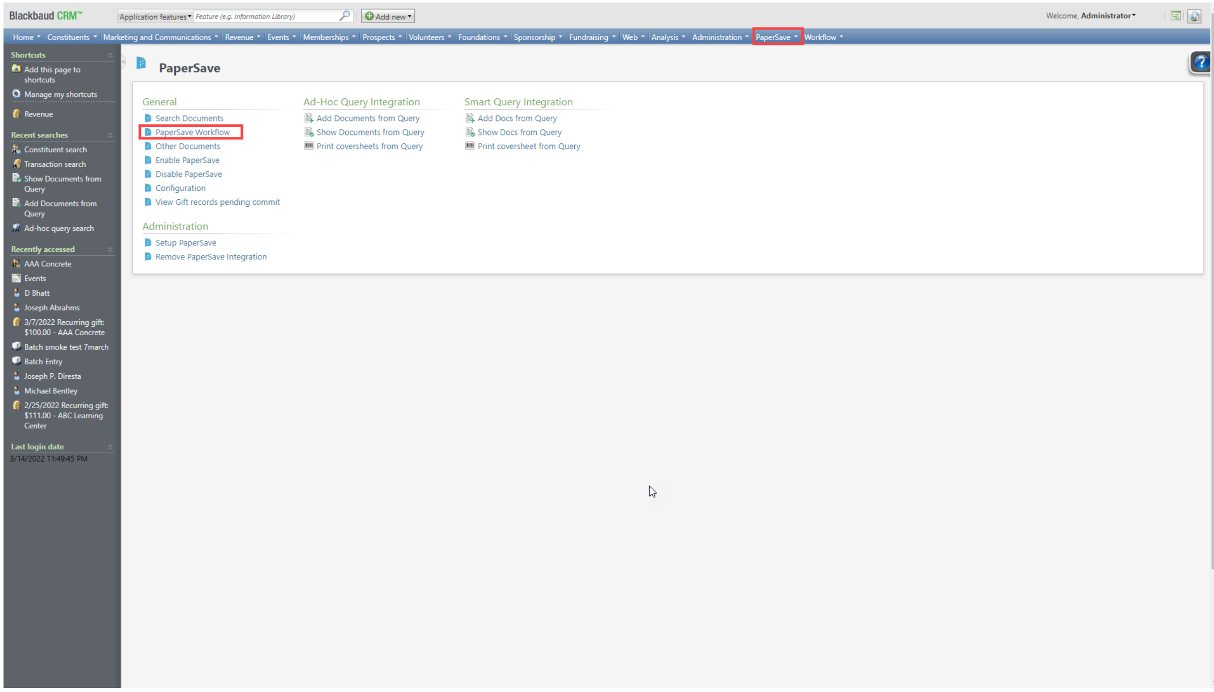
Follow the below steps to open PaperSave Workflow Area from the Blackbaud CRM application.

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.

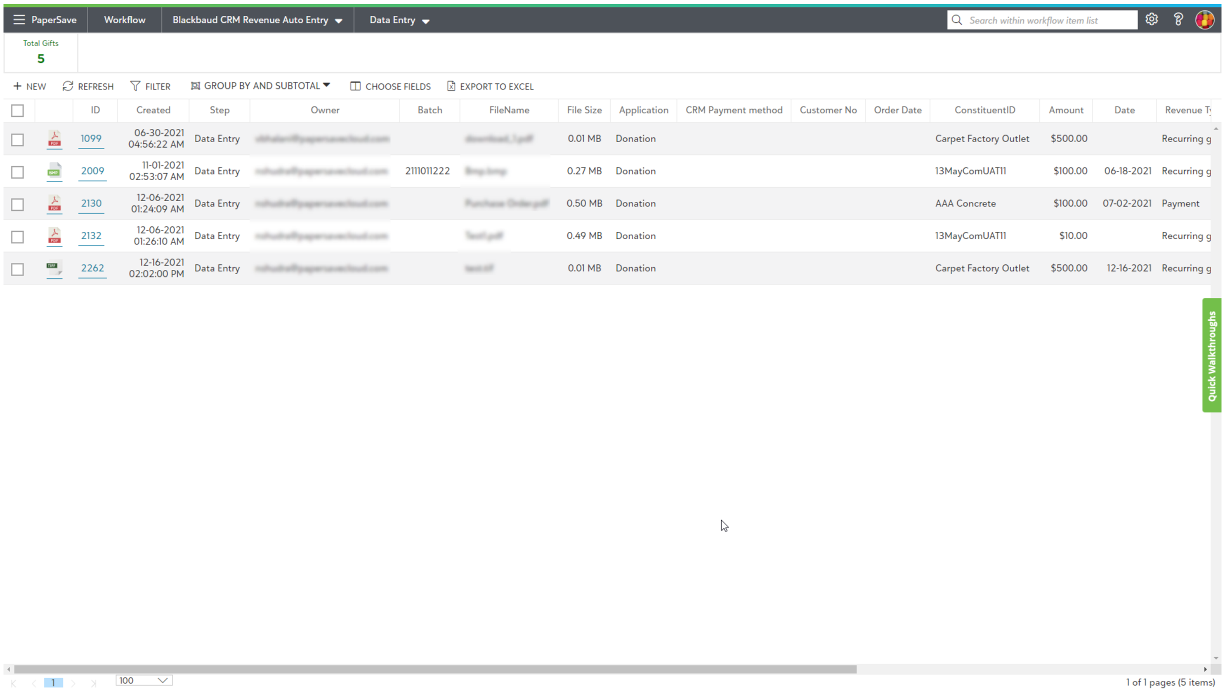


2) Now, click on the **PaperSave Workflow** option present in the General group as shown in the below screen:



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.


PaperSave
Workflow
Blackbaud CRM Revenue Auto Entry
Data Entry
Search within workflow item list
Total Gifts
5
NEW
REFRESH
FILTER
GROUP BY AND SUBTOTAL
CHOOSE FIELDS
EXPORT TO EXCEL
ID Created Step Owner Batch FileName File Size Application CRM Payment method Customer No Order Date ConstituentID Amount Date Revenue Ty
1099 06-30-2021 04:56:22 AM Data Entry 0.01 MB Donation Carpet Factory Outlet $500.00 Recurring g
2009 11-01-2021 02:53:07 AM Data Entry 2111011222 0.27 MB Donation 13MayComUAT11 $100.00 06-18-2021 Recurring g
2130 12-06-2021 01:24:09 AM Data Entry 0.50 MB Donation AAA Concrete $100.00 07-02-2021 Payment
2132 12-06-2021 01:26:10 AM Data Entry 0.49 MB Donation 13MayComUAT11 $10.00 Recurring g
2262 12-16-2021 02:02:00 PM Data Entry 0.01 MB Donation Carpet Factory Outlet $500.00 12-16-2021 Recurring g
Quick Walkthroughs
100
1 of 1 pages (5 items)

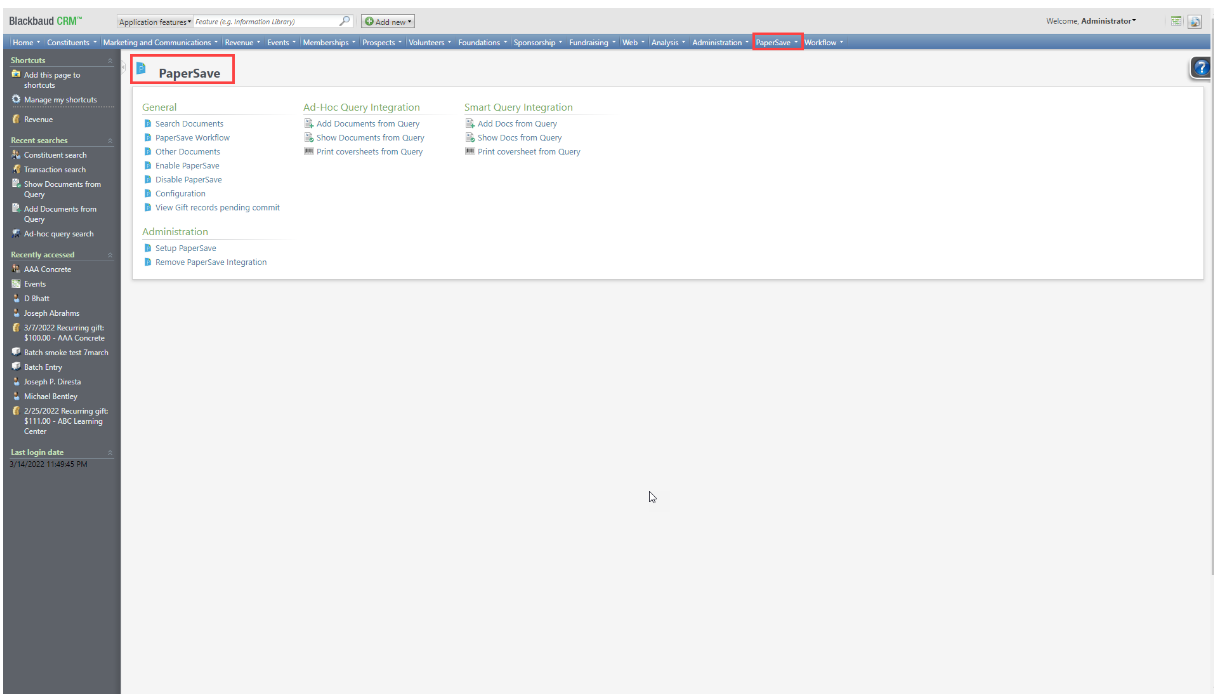
Other Documents

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.

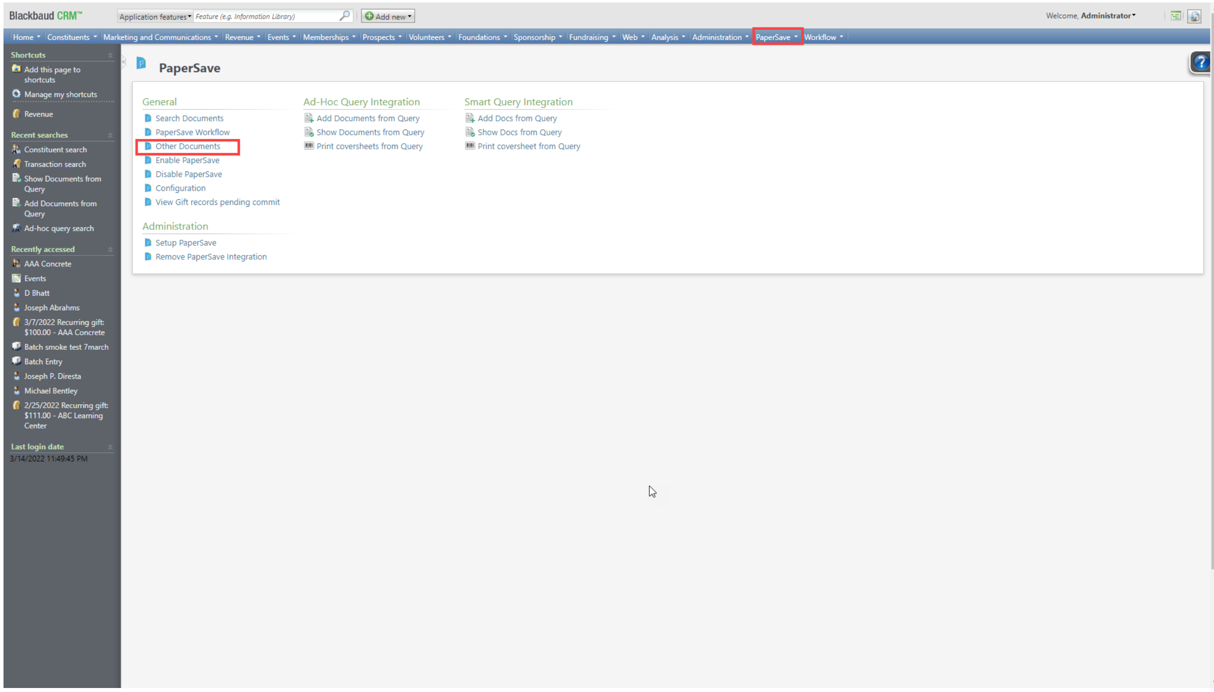
Follow the below steps to add/view PaperSave documents:

1) Go to Blackbaud CRM toolbar and select PaperSave drop-down arrow 

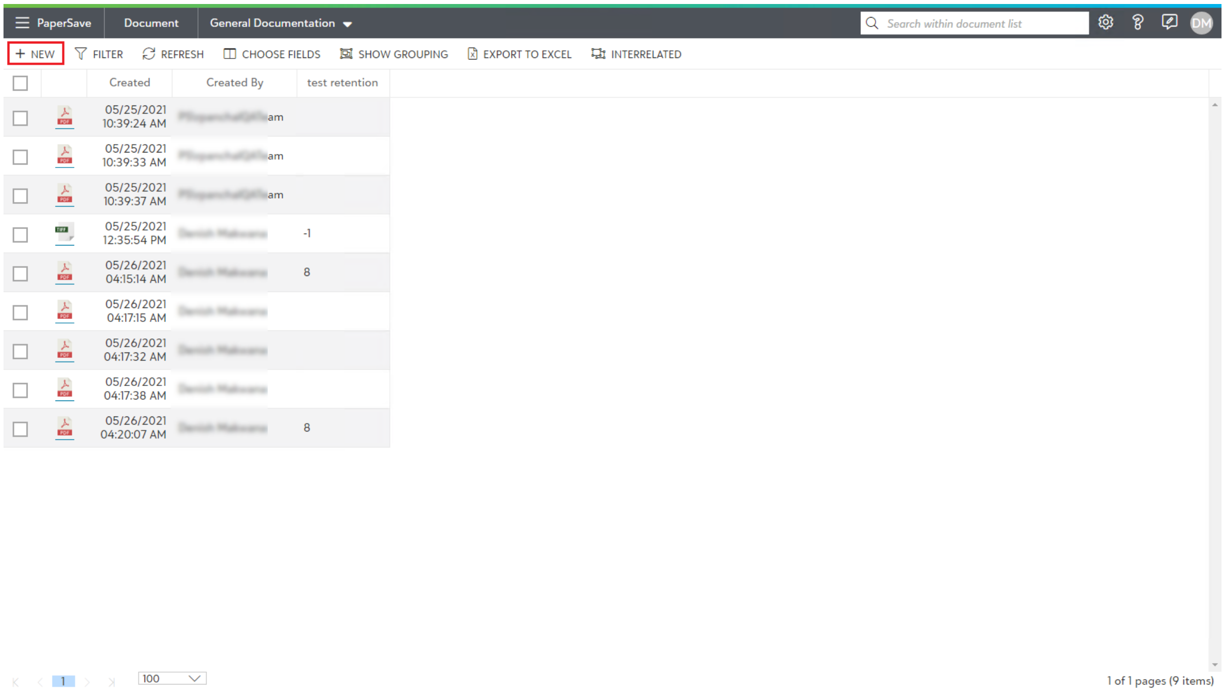
to view all the PaperSave options or directly click on **PaperSave** to open all options in a new tab as shown below.



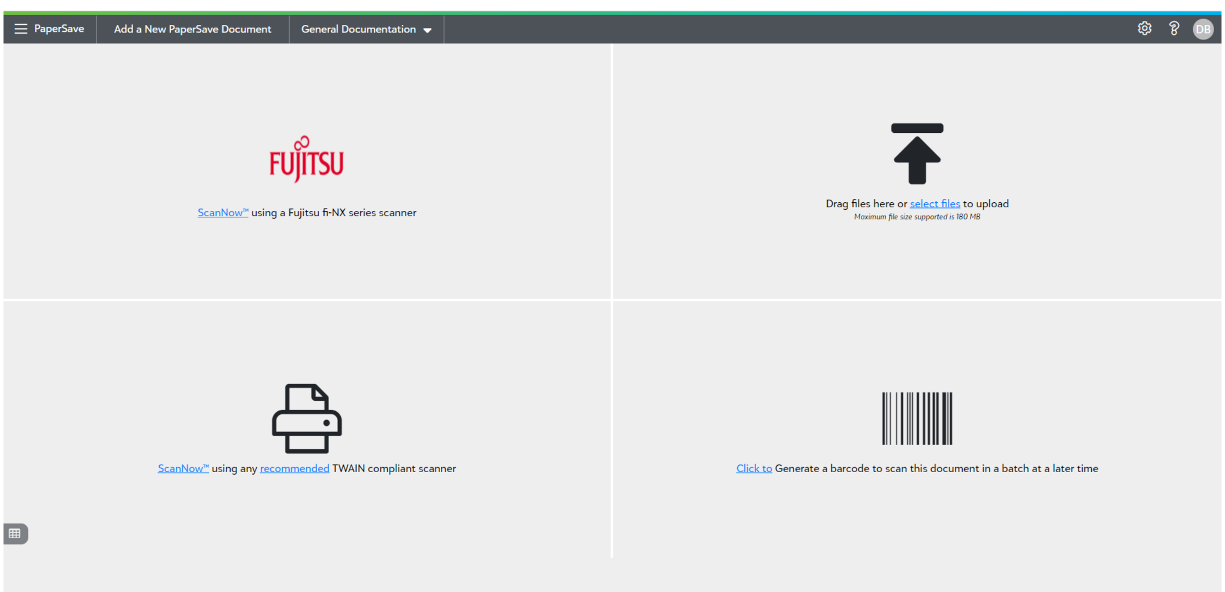
2) Now, click on the **Other Documents** option present in the General group as shown in the below screen:



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.



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



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.

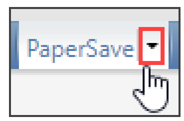
> **Note:** The documents added within the PaperSave document type cannot be submitted to the Blackbaud CRM.

Enable/Disable PaperSave

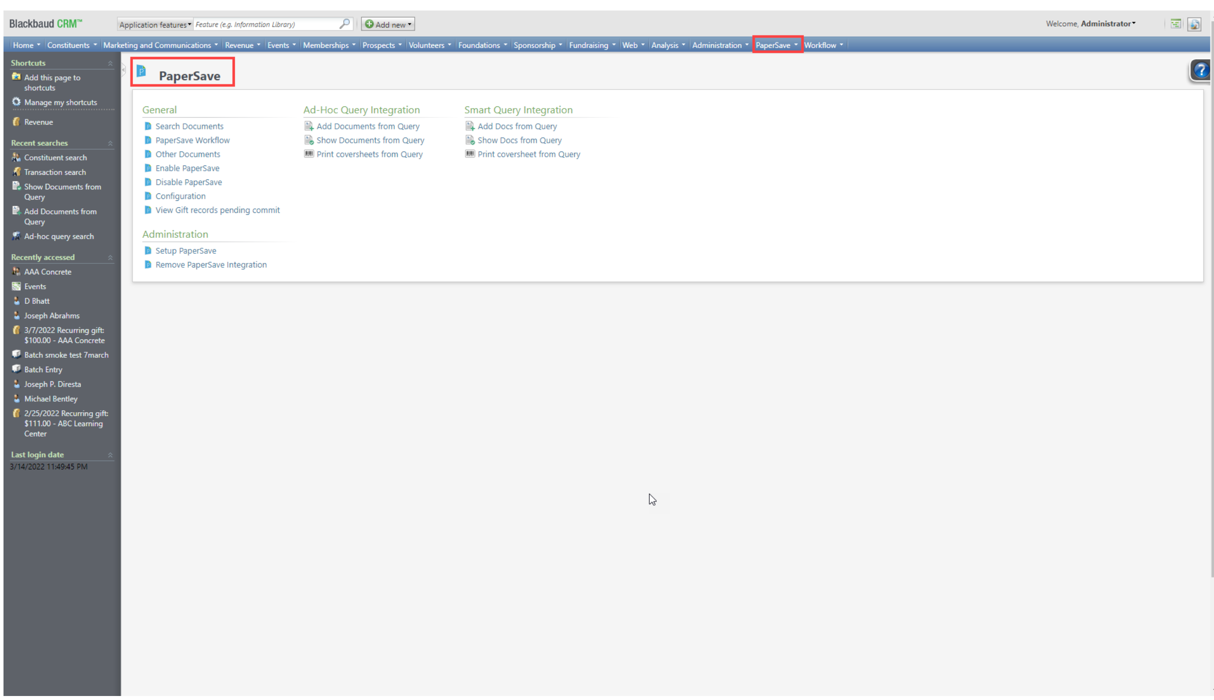
You can control the PaperSave options accessibility within PaperSave supported record types of Blackbaud CRM using Enable/Disable option from PaperSave customized menu.

> **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.

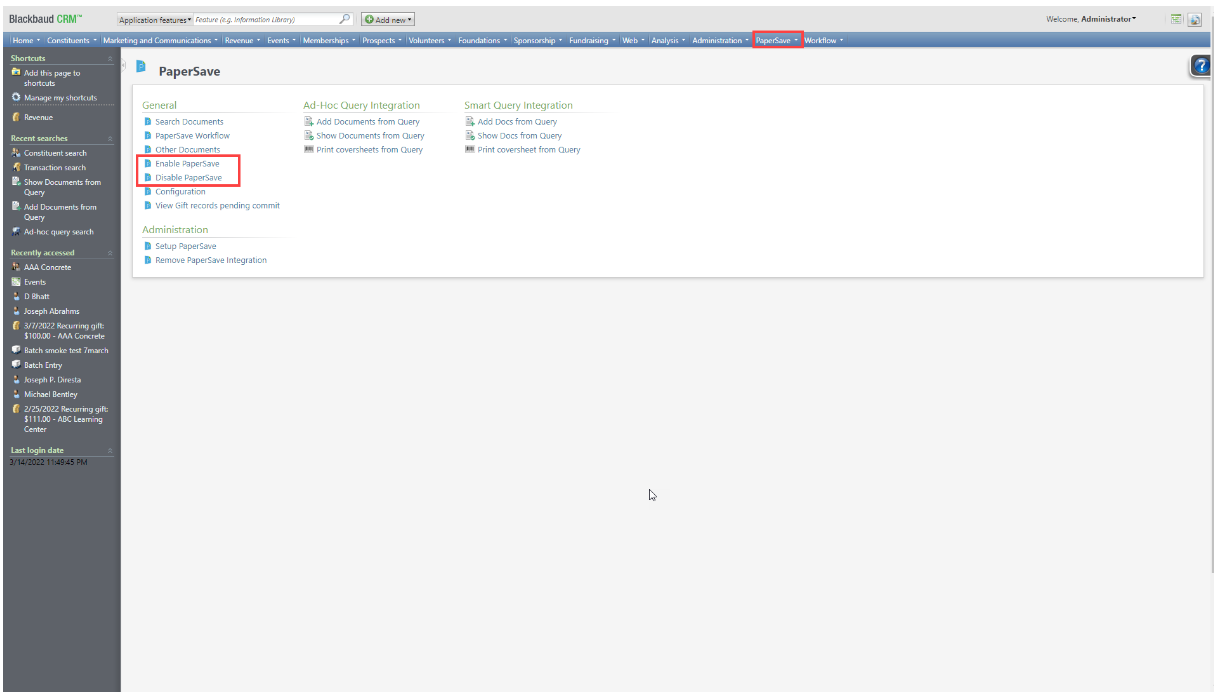
Follow the below steps to enable/disable the PaperSave options.

1) First, go to Blackbaud CRM toolbar and select PaperSave drop-down arrow 

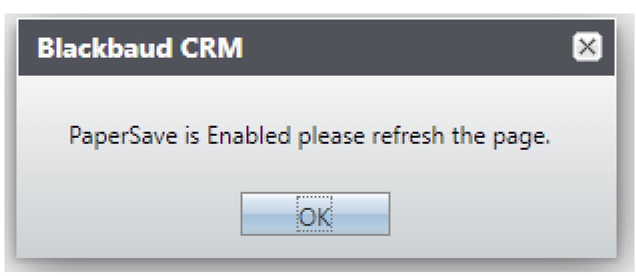
to view all the PaperSave options or directly click on **PaperSave** to open all options in a new tab as shown below.

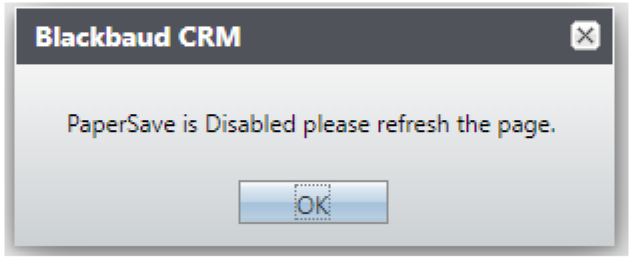


2) Now, click on the **Enable PaperSave** option to start using PaperSave options and **Disable PaperSave** option to stop the working of PaperSave options across all the PaperSave supported record types as shown in the below screen:



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




Blackbaud CRM
PaperSave is Disabled please refresh the page.
OK

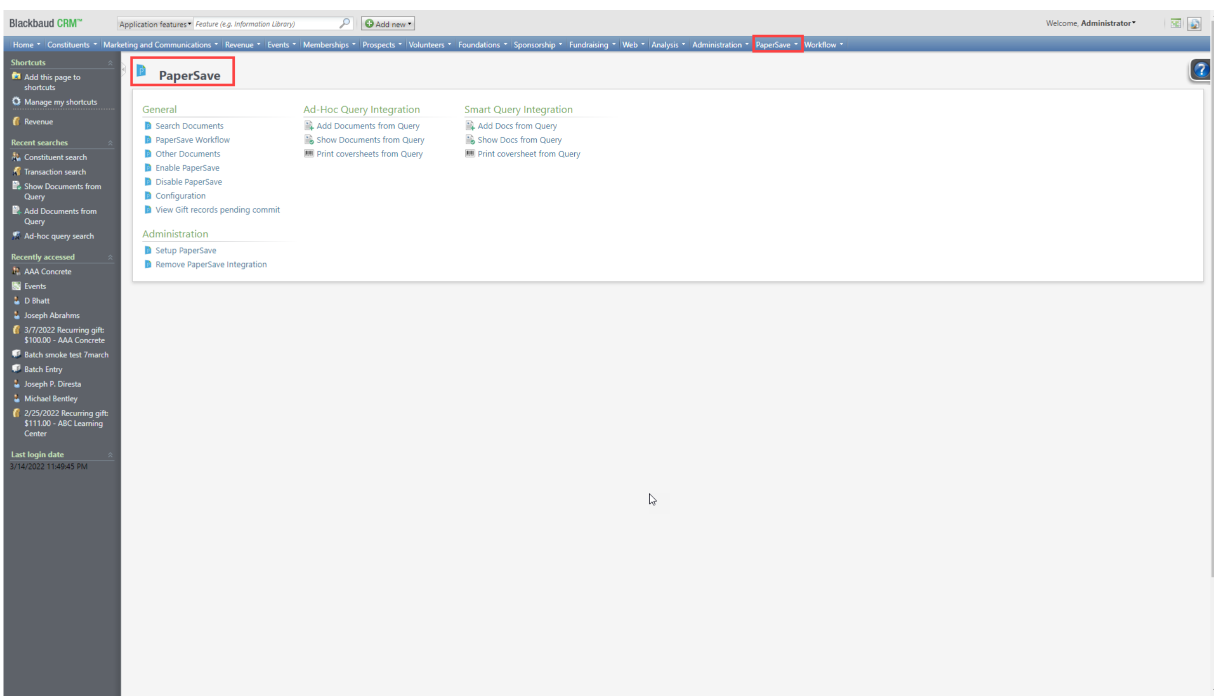
Configuration

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

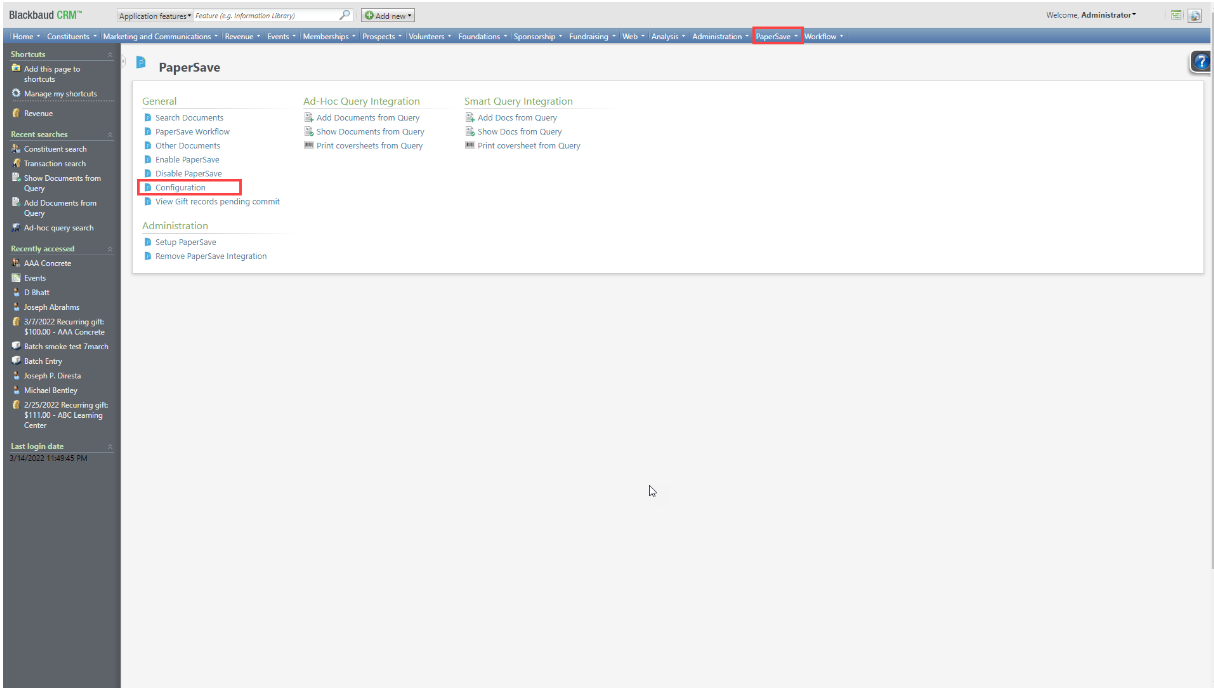
Follow the below steps to define such responsible user from Configuration option:

1) First, go to Blackbaud CRM toolbar and select PaperSave drop-down arrow 

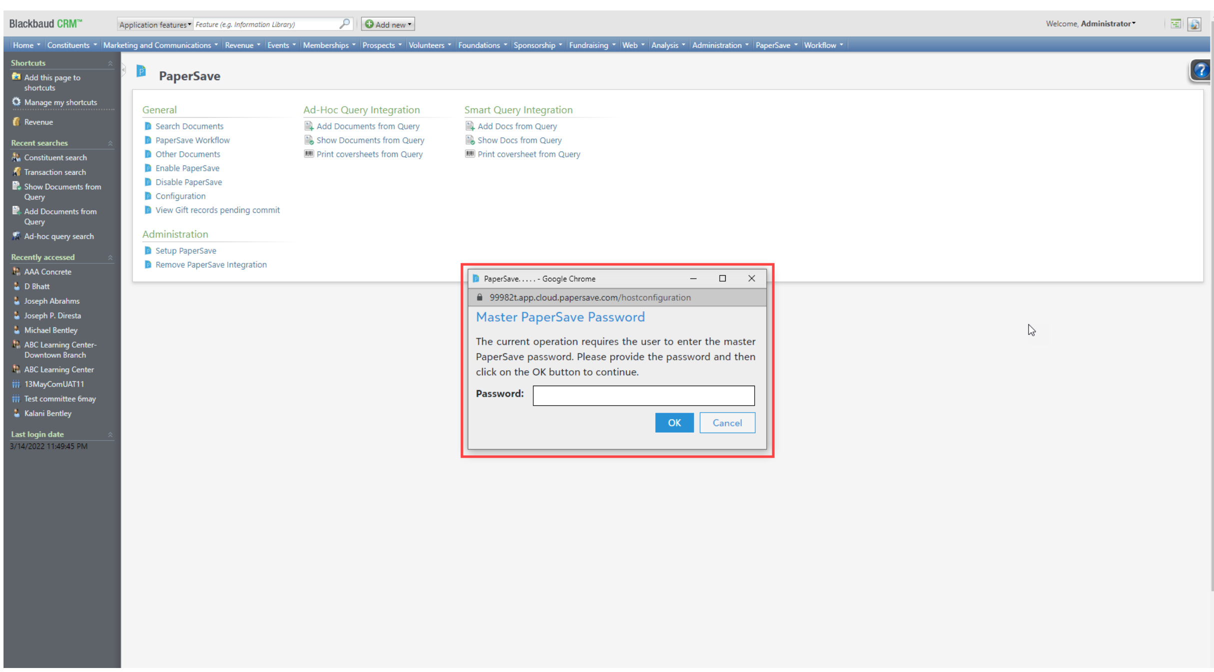
to view all the PaperSave options or directly click on **PaperSave** to open all options in a new tab as shown below.



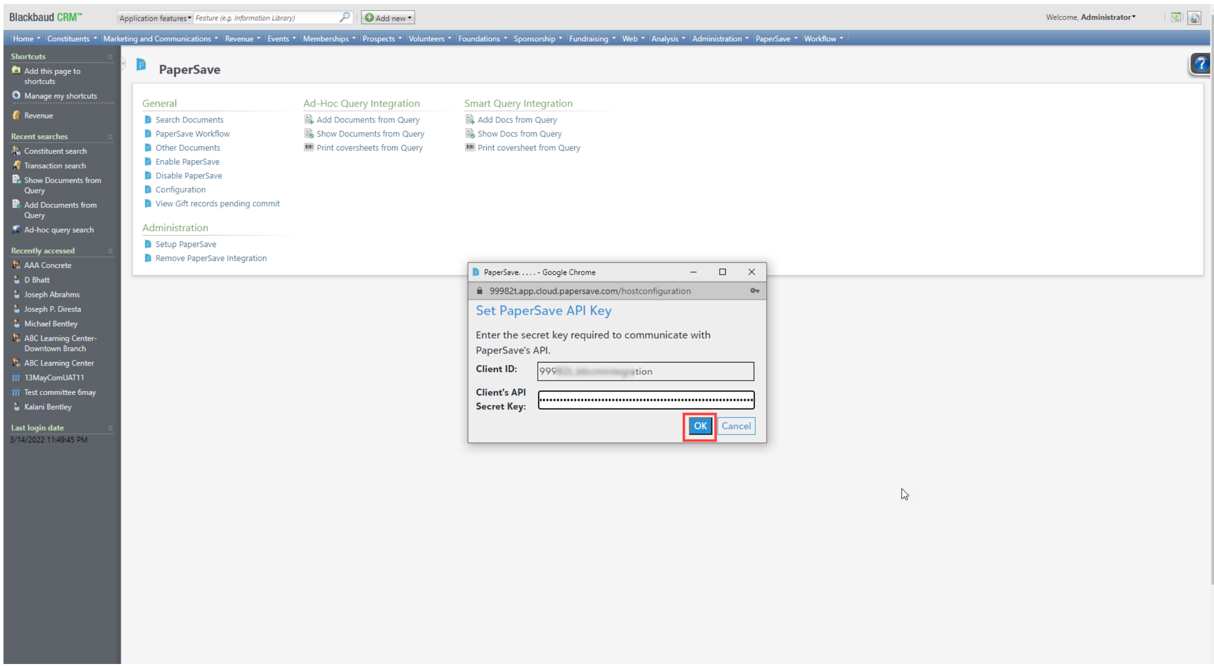
2) Now, click on the **Configuration** option present in the General group as shown in the below screen:



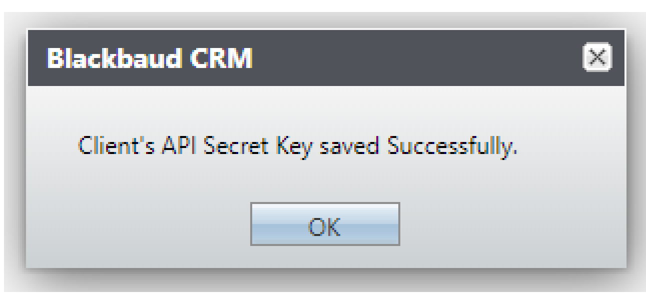
3) Now, it prompts for PaperSave's Master Password. Enter the Password and Click on **OK**.



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.



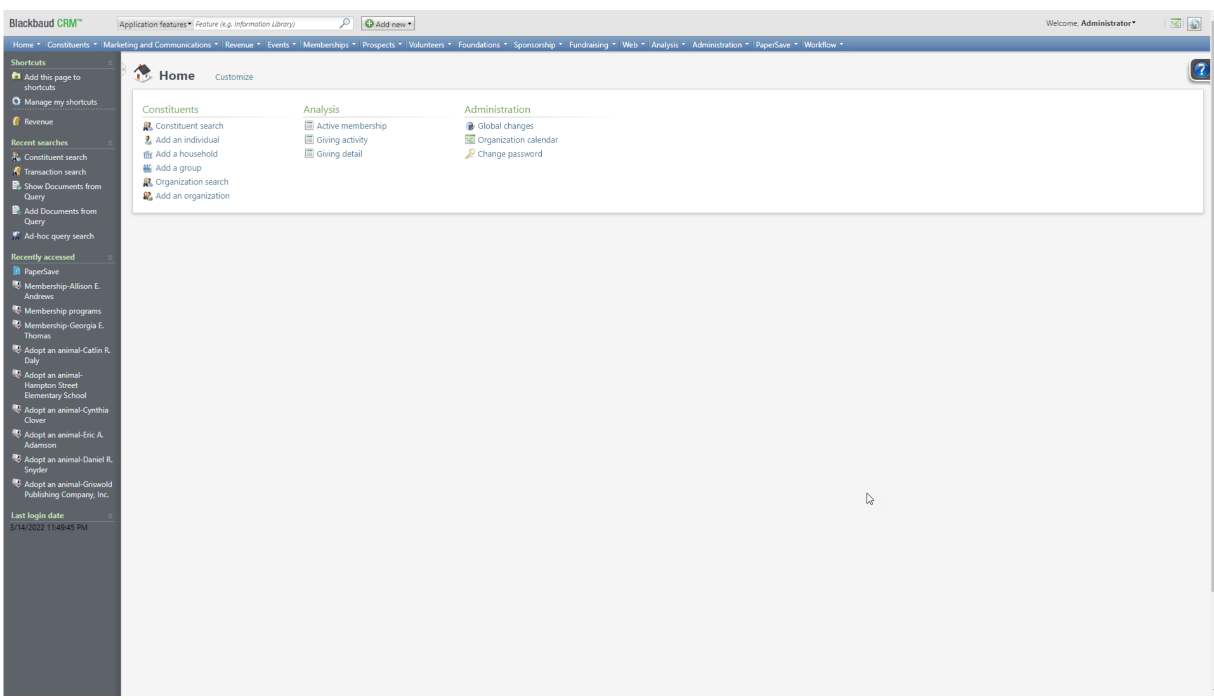
View Gift records pending commit

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.

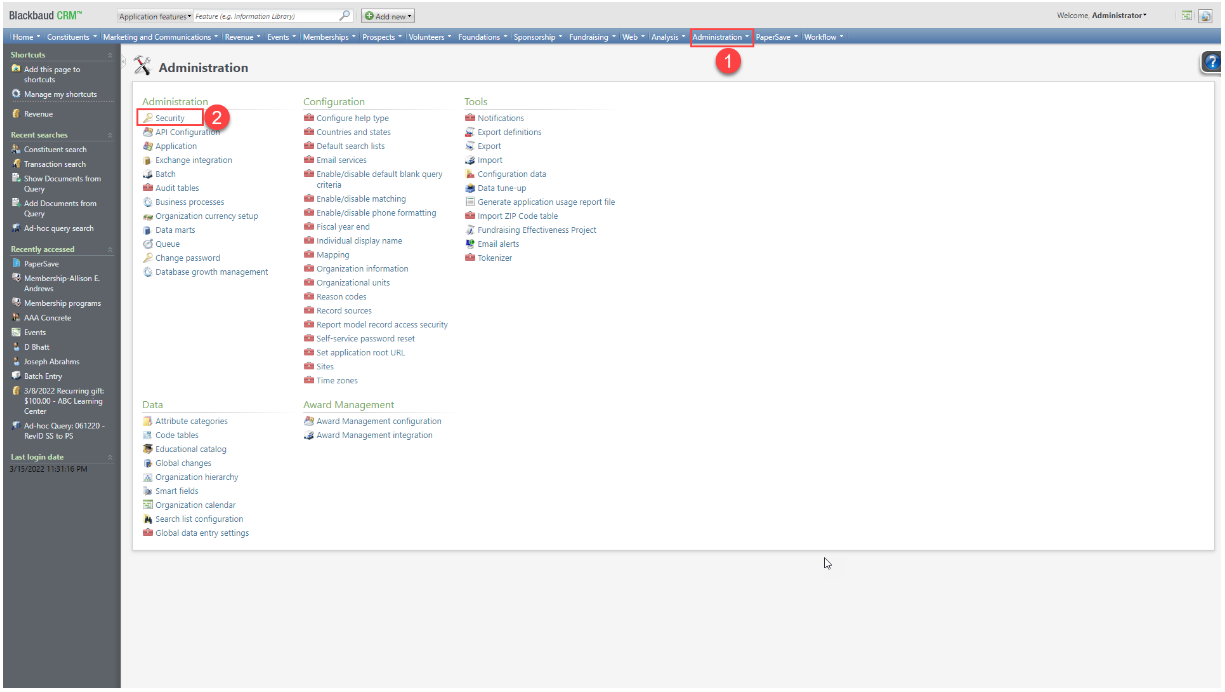
How to enable "View gift records pending commit" option in PaperSave Menu within Blackbaud CRM ?

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.

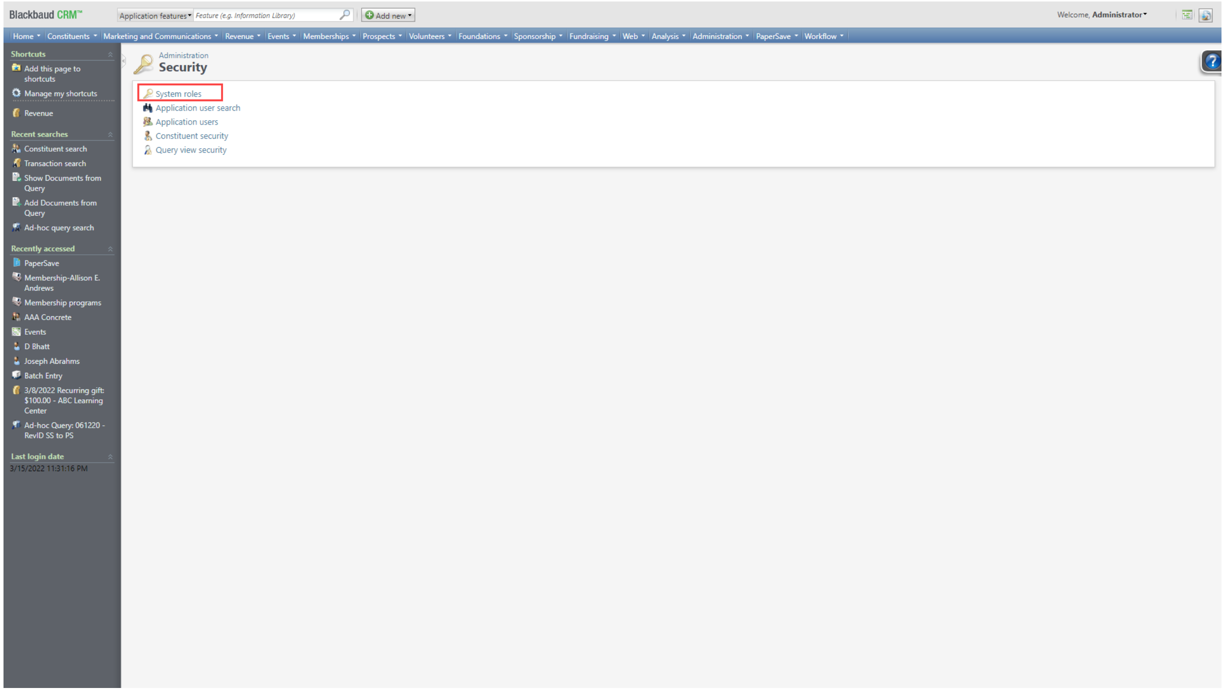
1) Log-in to Blackbaud CRM.



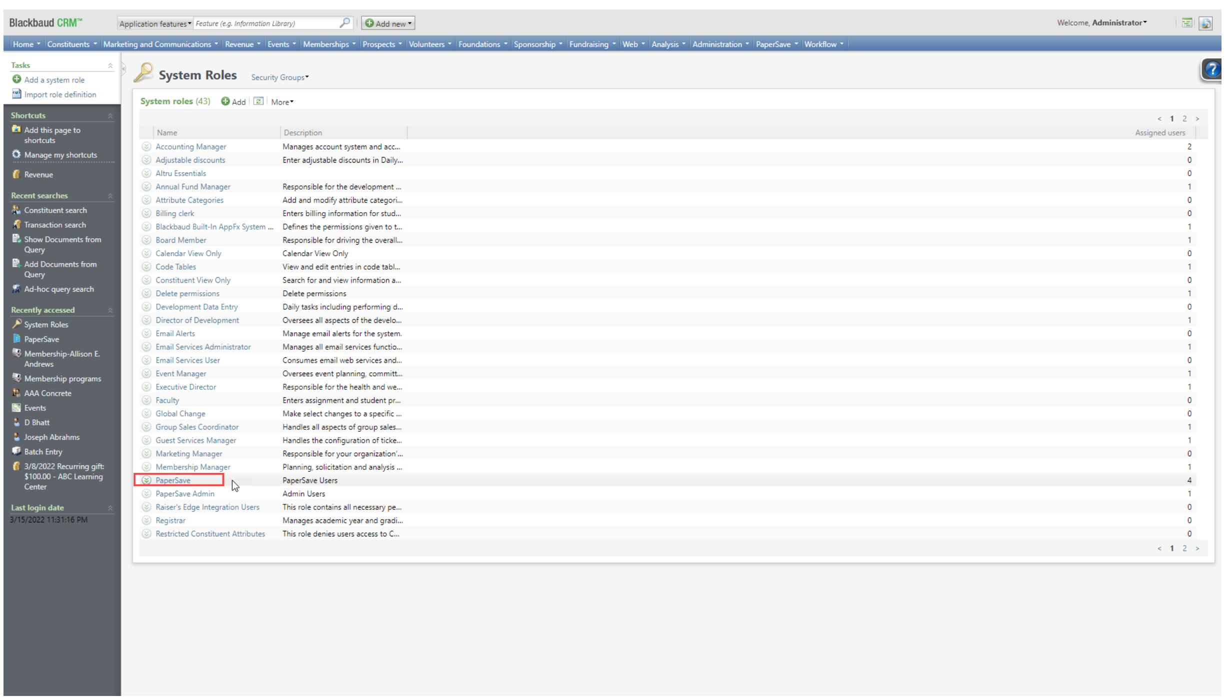
2) Click on **Administration** menu. Then, click on **Security**.



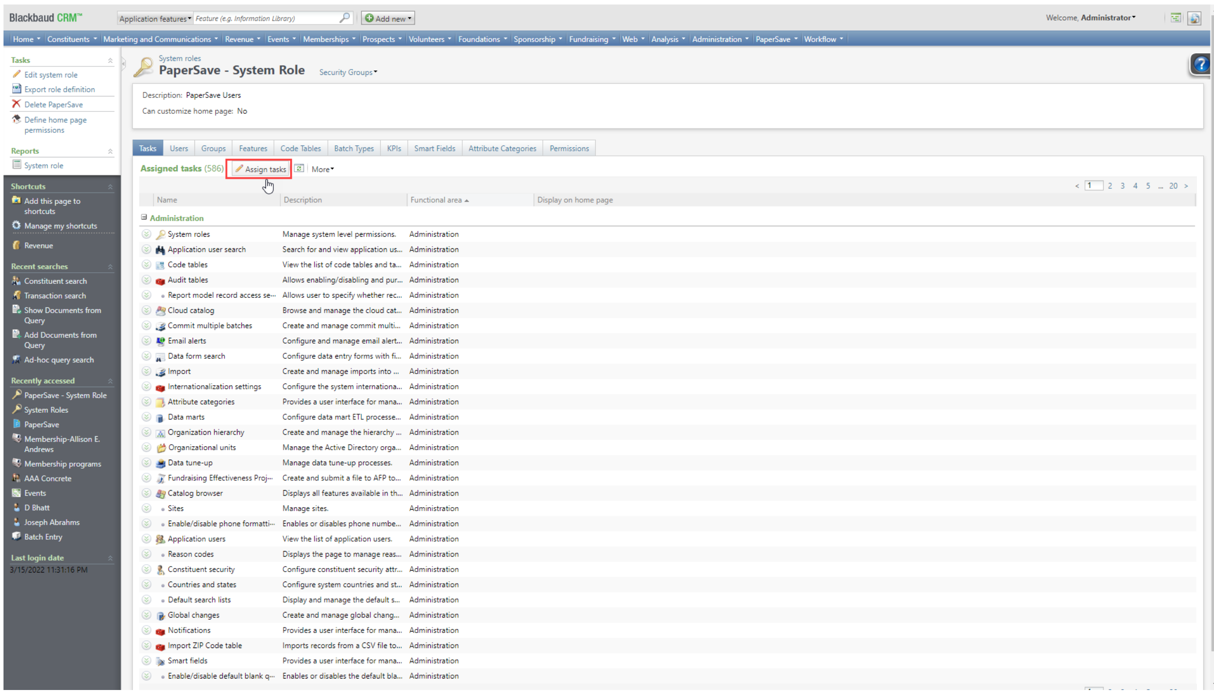
3) Click on **System roles** in the Security section.



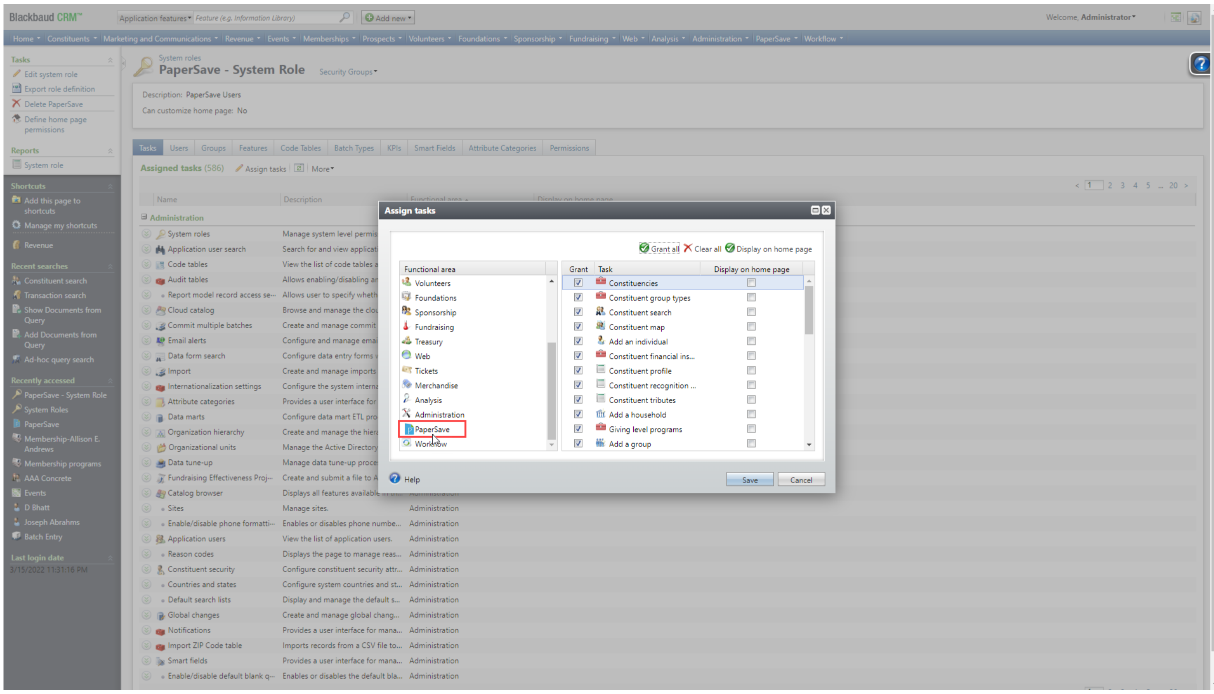
4) Click on **PaperSave** in the "System Roles".



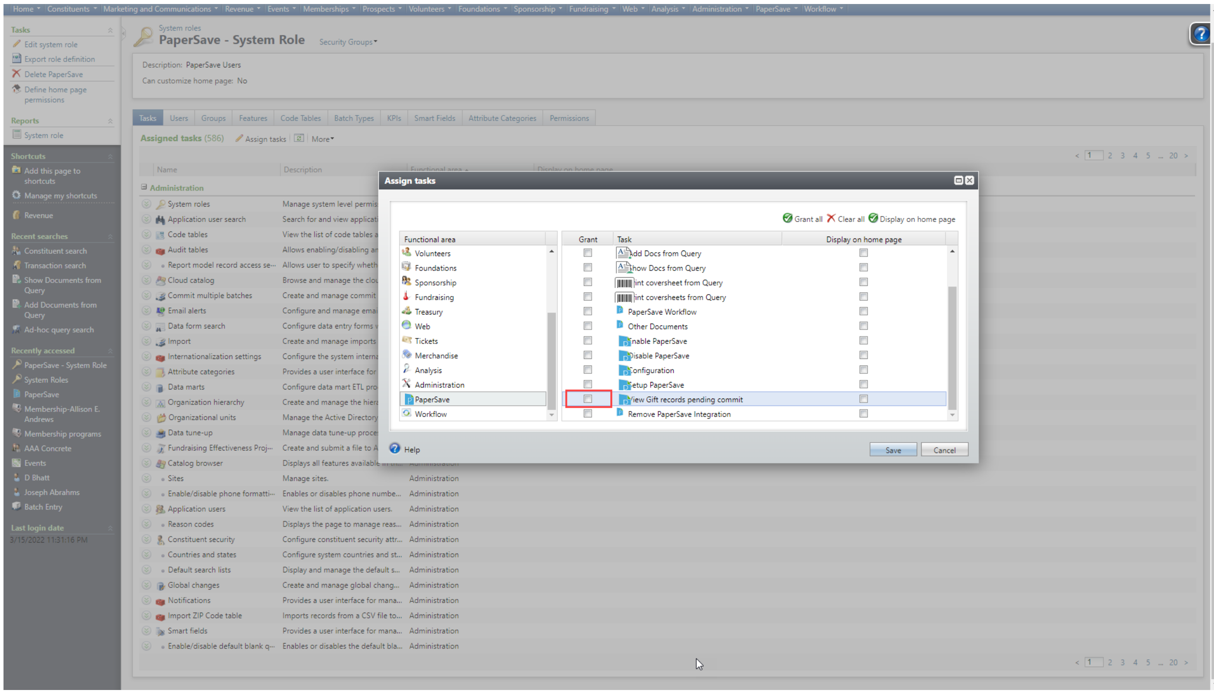
5) Now, click on **Assign Tasks** in PaperSave System Role.



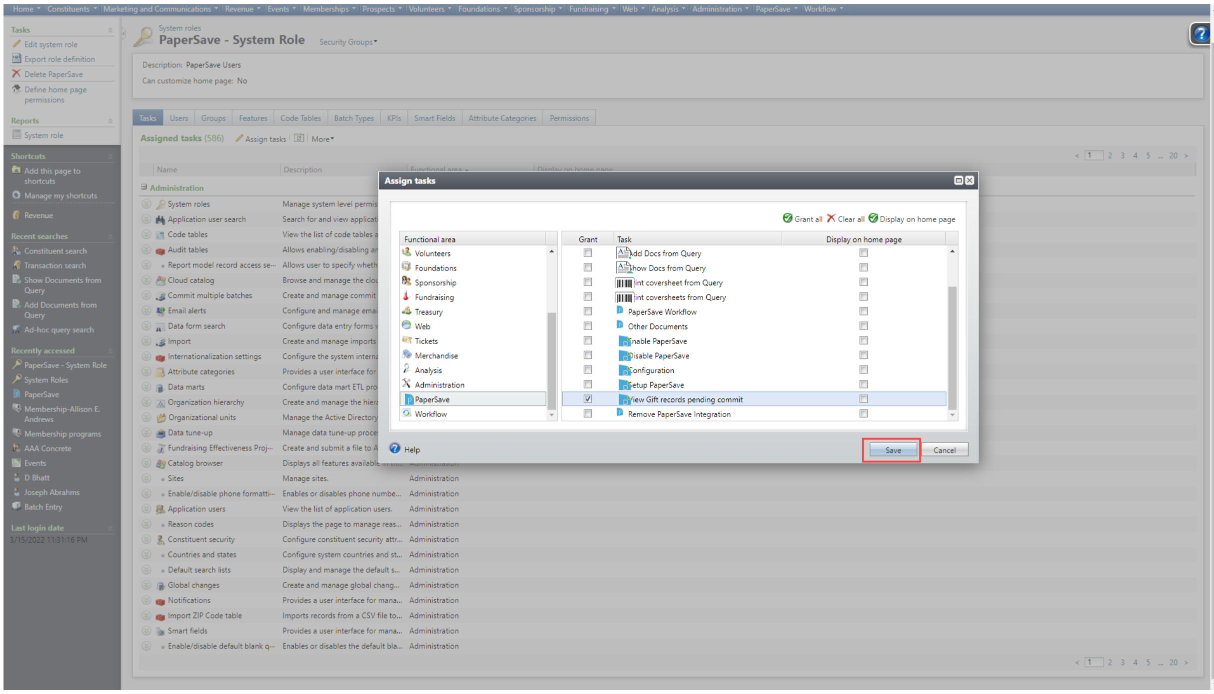
6) Select **PaperSave** from the functional area section.



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



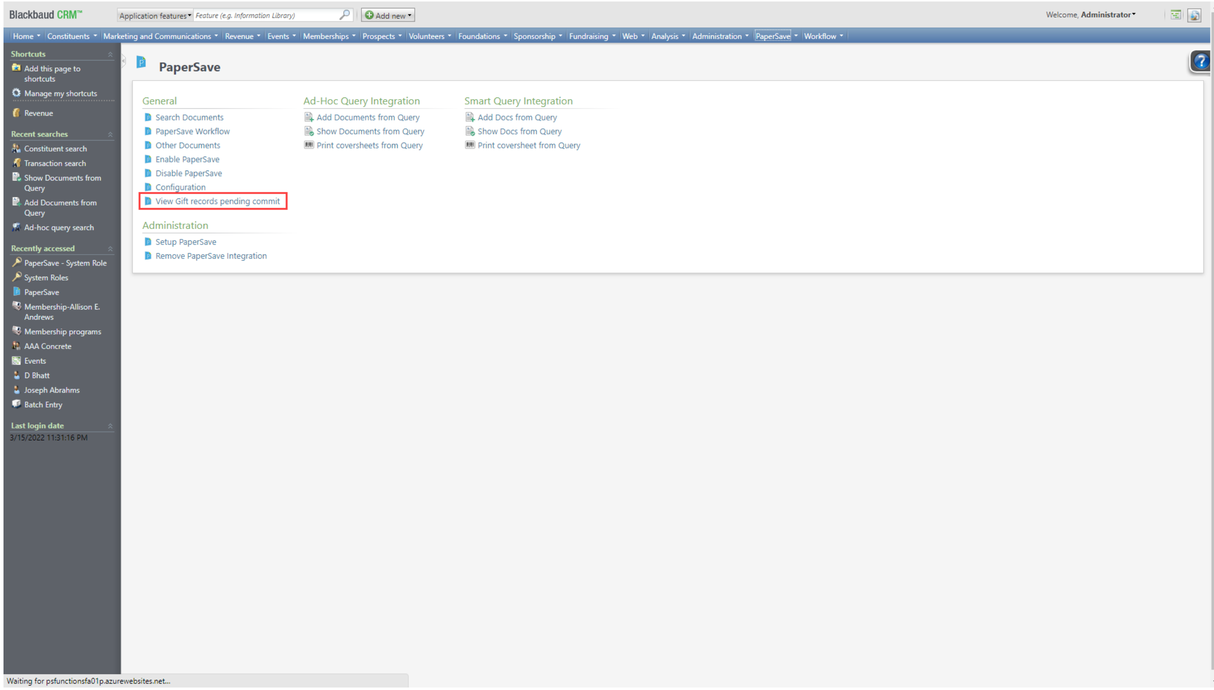
8) Click on the **Save** option. Now, the **View gift records pending commit** option is available under the General group in PaperSave Menu tab.



> **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.

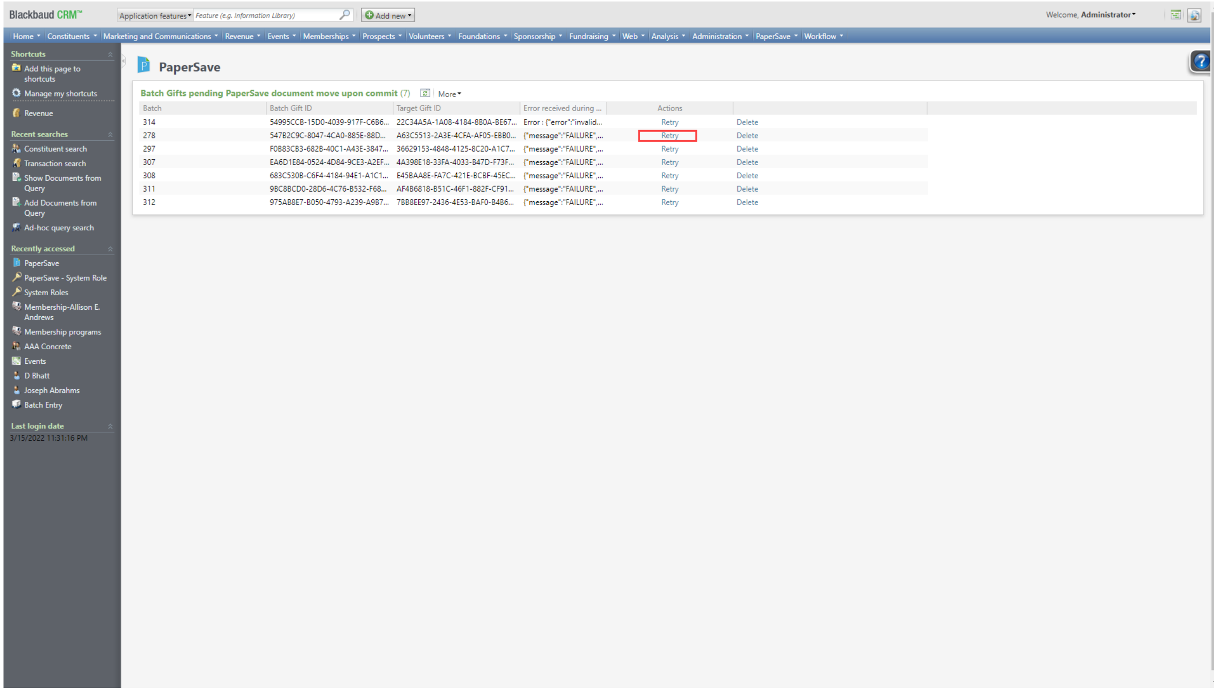
How to use "View gift records pending commit" feature in Blackbaud CRM ?

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

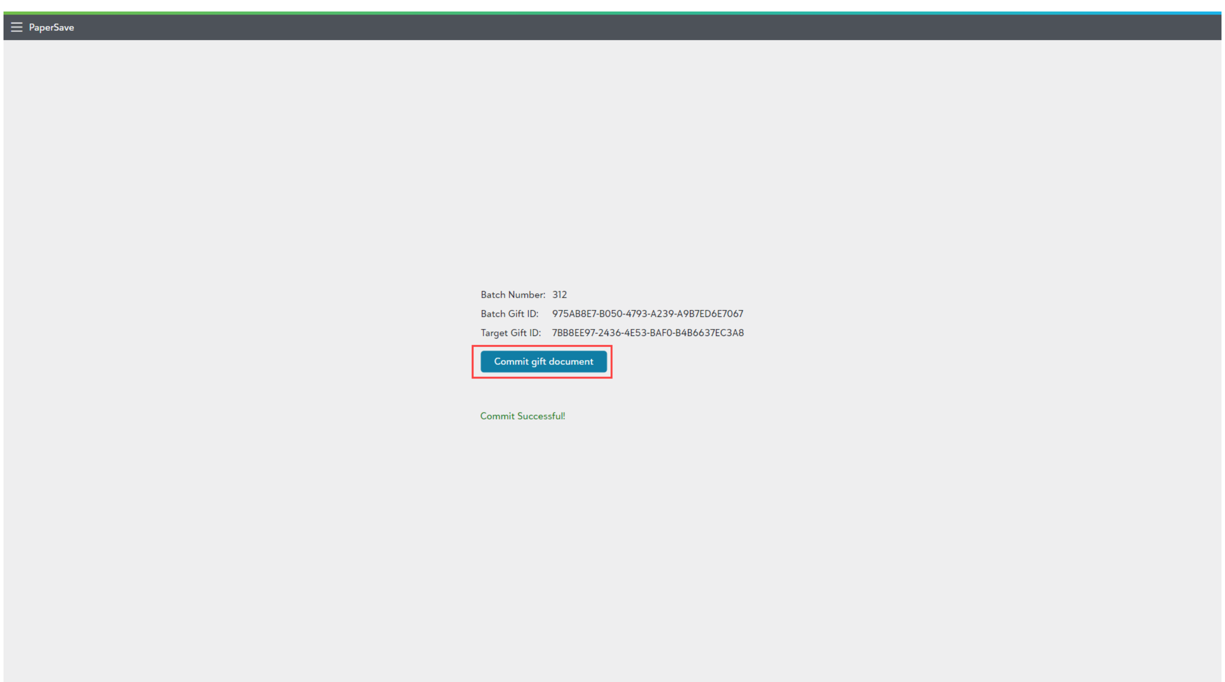


2) Click on **View gift records pending commit** option.

3) You will see the links with the list of batches that were committed successfully in Blackbaud CRM but PaperSave 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.



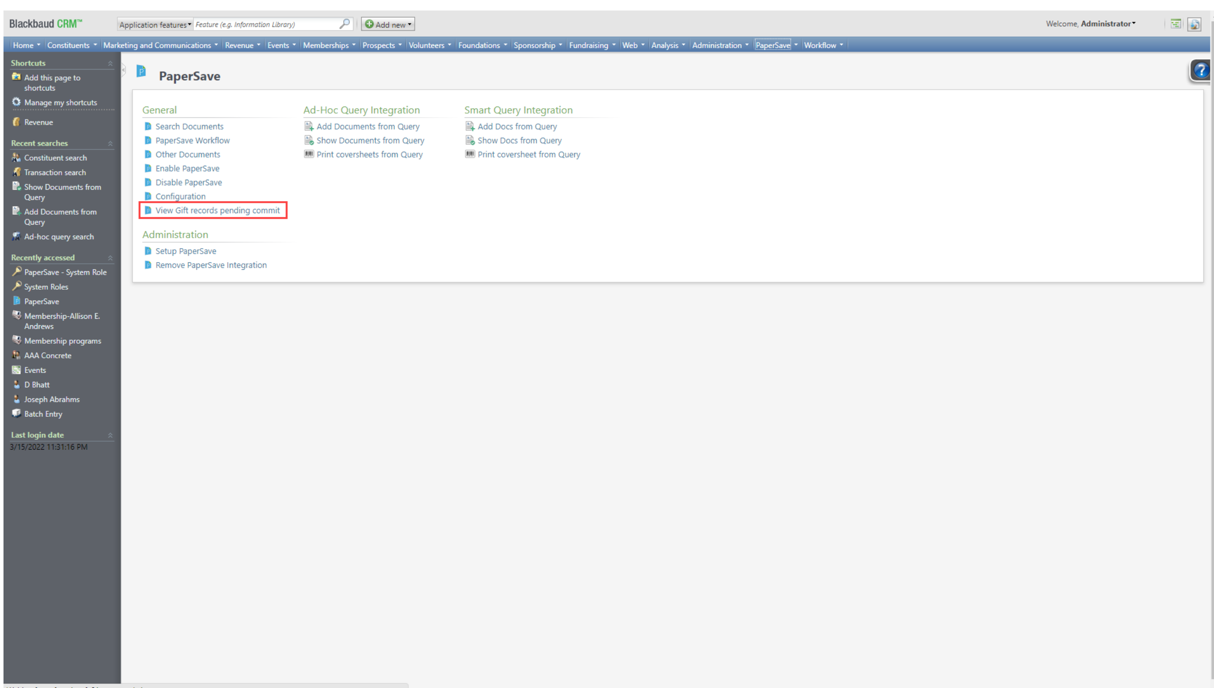
5) Once batch **Commit gift document** operation is performed successfully, it shows a message “Commit Successful!”.

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

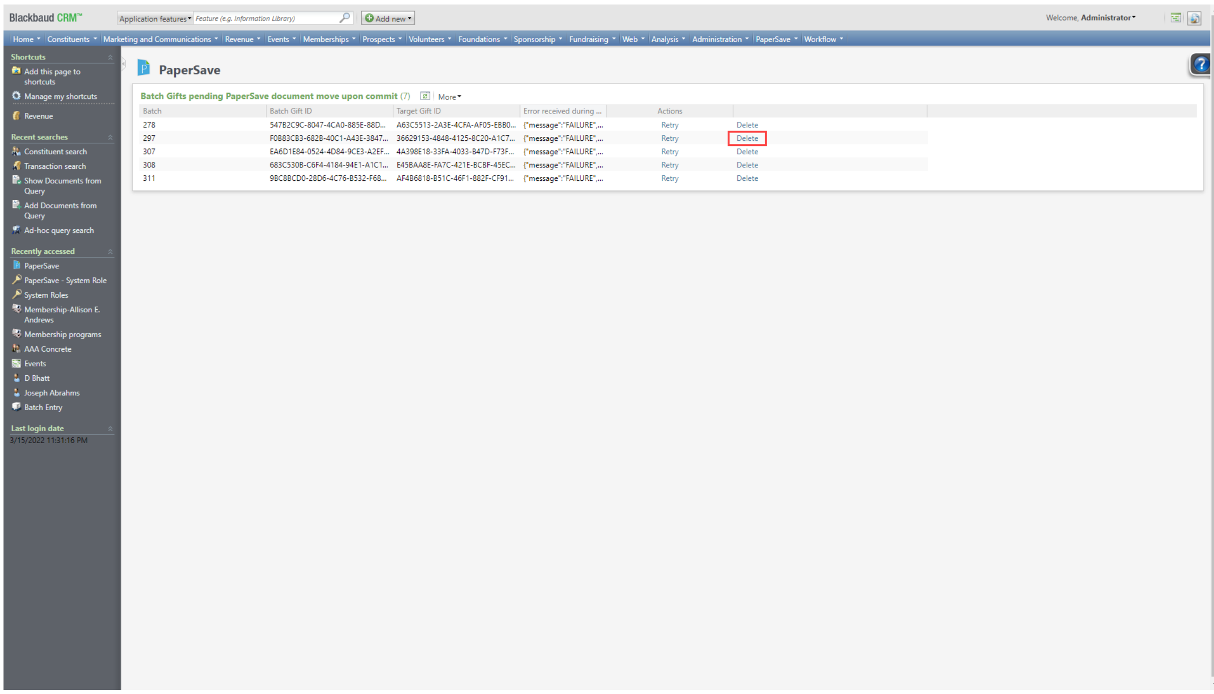
Follow the below steps to discard such batch that was committed successfully, but PaperSave document(s) were not associated.

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

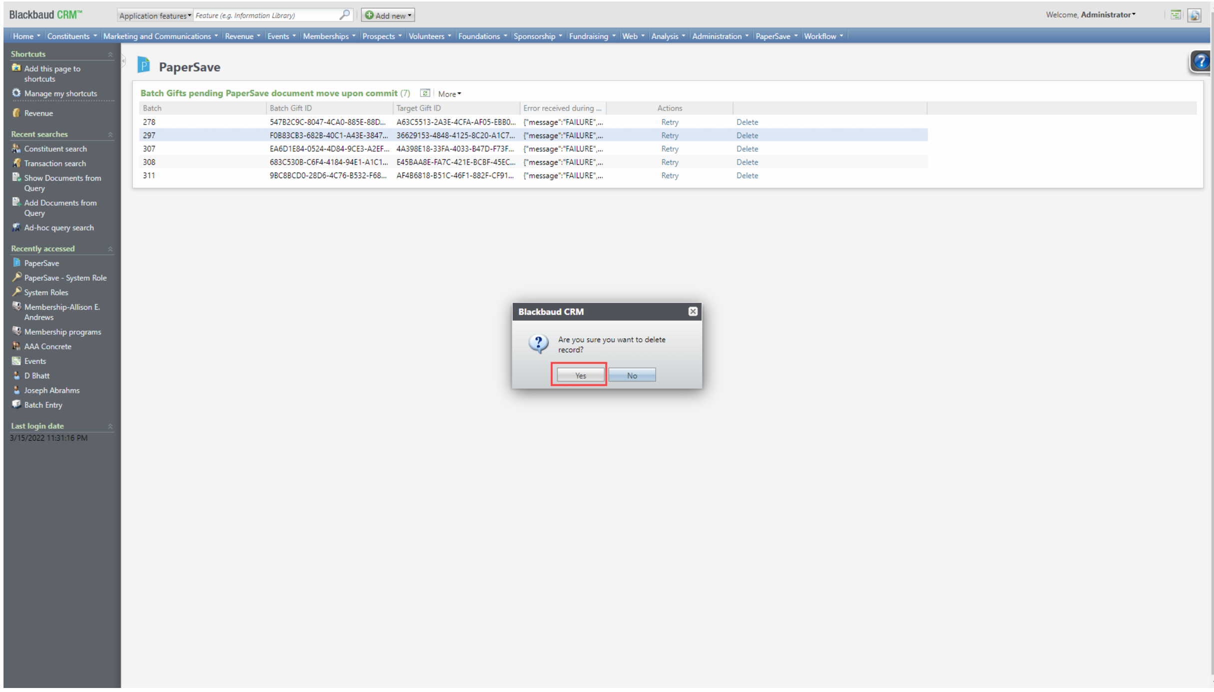


2) Click on **View gift records pending commit** option.

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.

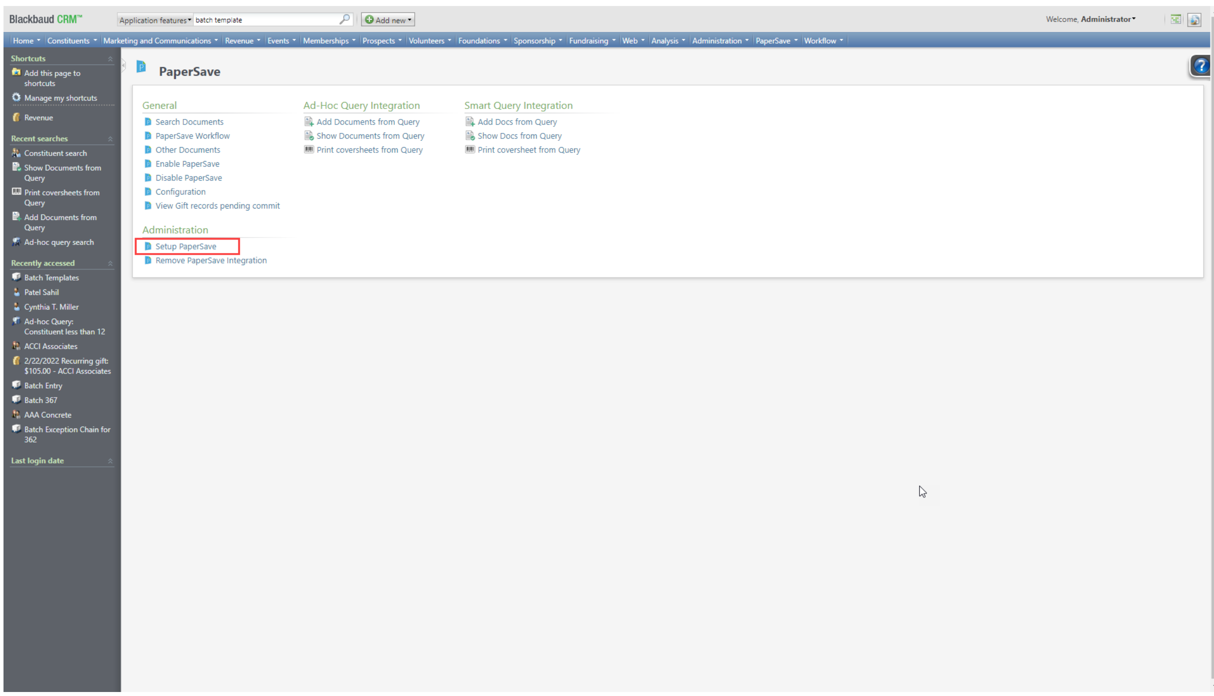


Note: Please re-launch Blackbaud CRM in the browser, If you are aware that **View gift records pending commit** option is enabled in the PaperSave menu tab within Blackbaud CRM, and still you are not able to view this option.

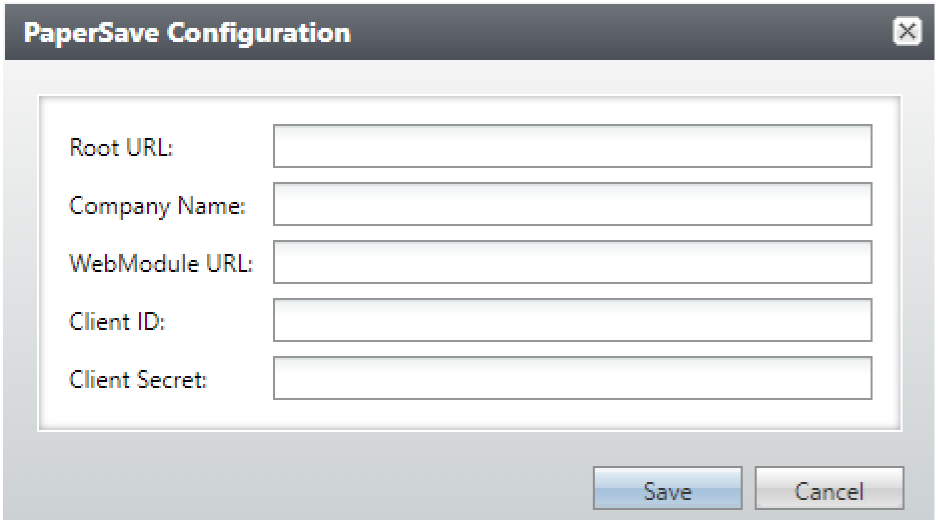
Setup PaperSave

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.



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

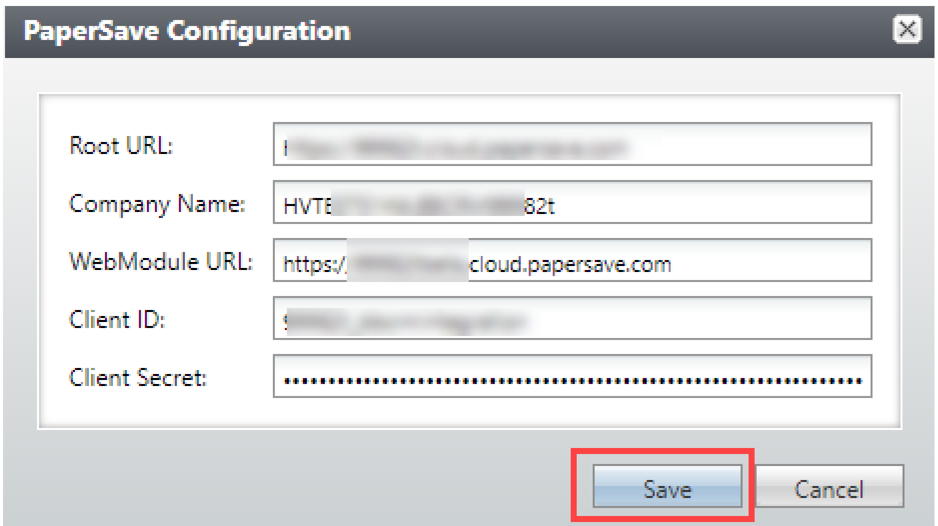
If Blackbaud CRM server is not installed on the instance, then use the below format SQLSERVERNAME.BBCRMDatabase

> **Example:** HPSDEV45.BBInfinity

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

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

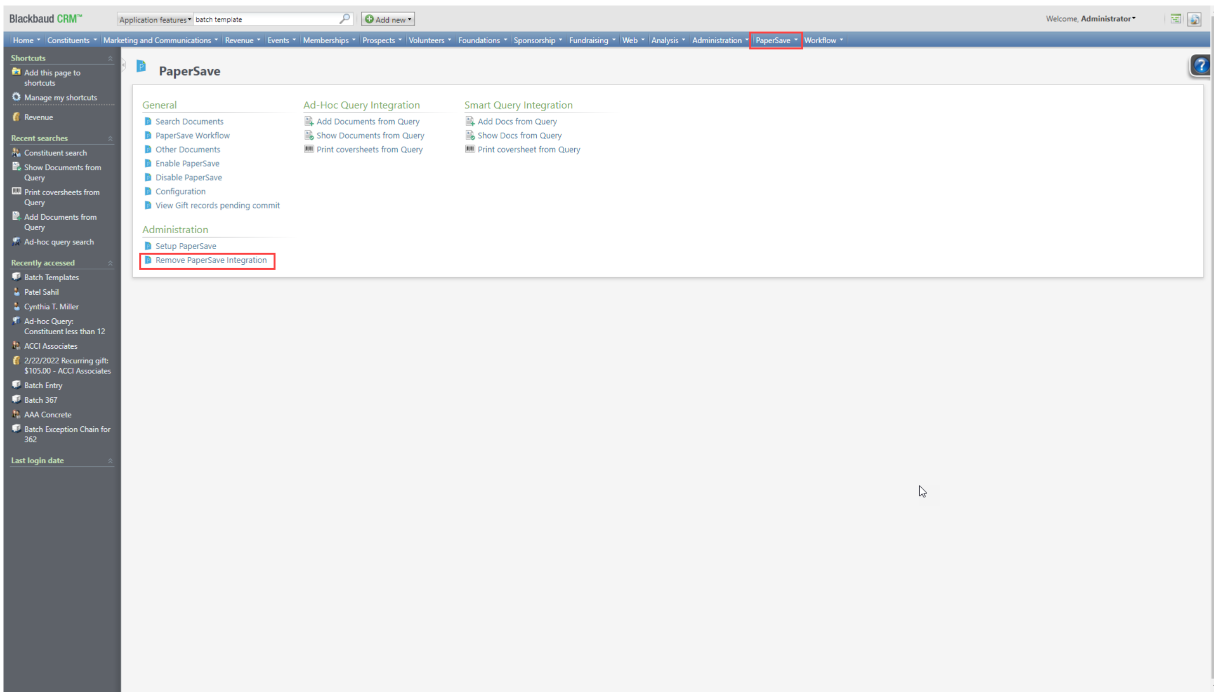
- **Client ID:** Enter the PaperSave Client ID. You can get these details from PaperSave team.
- **Client Secret:** Enter the PaperSave Client secret key. You can get these details from PaperSave team.



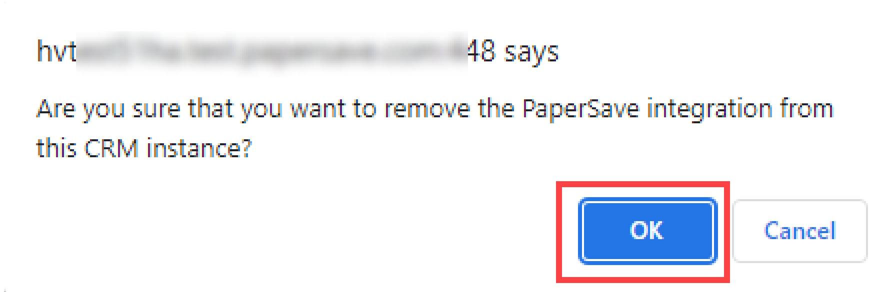
Remove PaperSave Integration

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

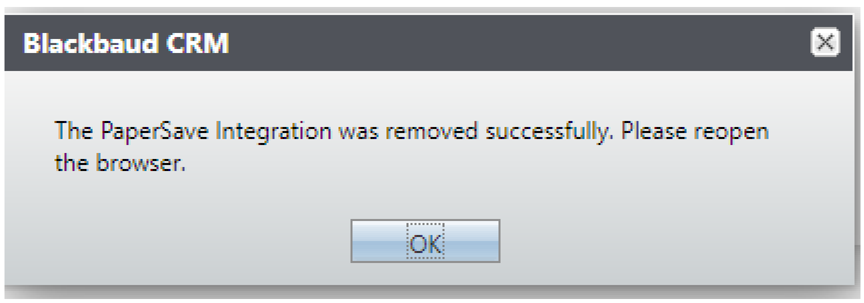
1) Go to “PaperSave" Tab and select **Remove PaperSave Integration** from Administration group as mentioned in below screen.



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



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

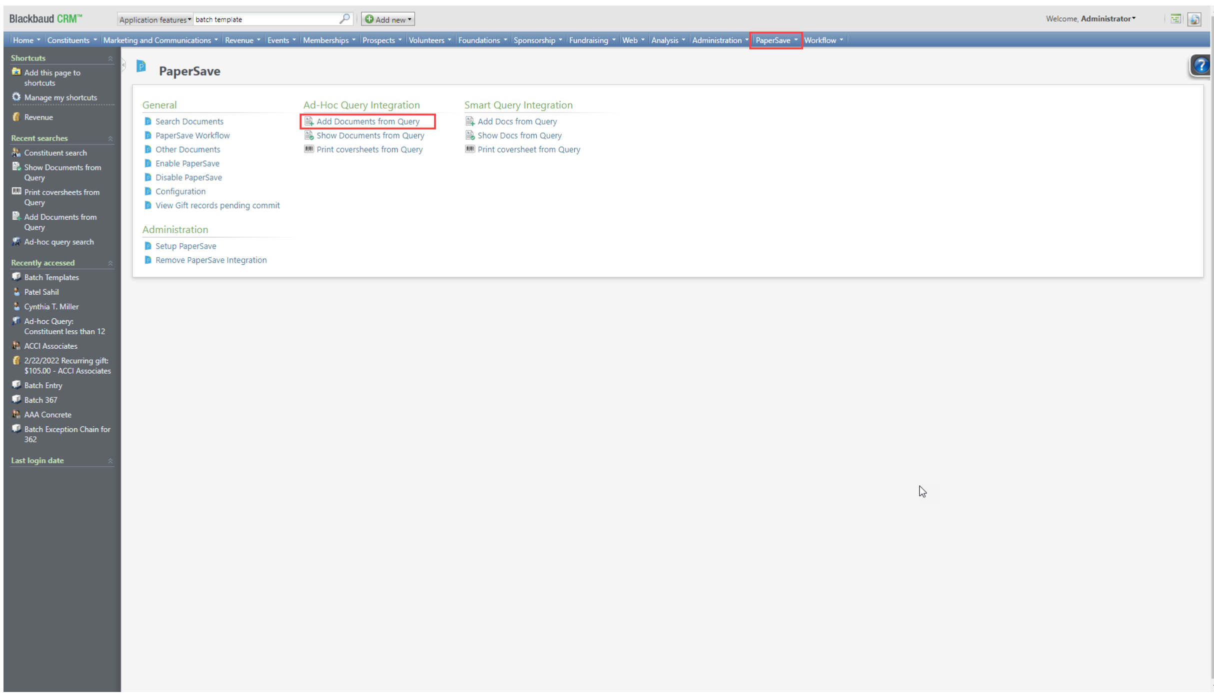


4) Now, relaunch Blackbaud CRM application in the browser.

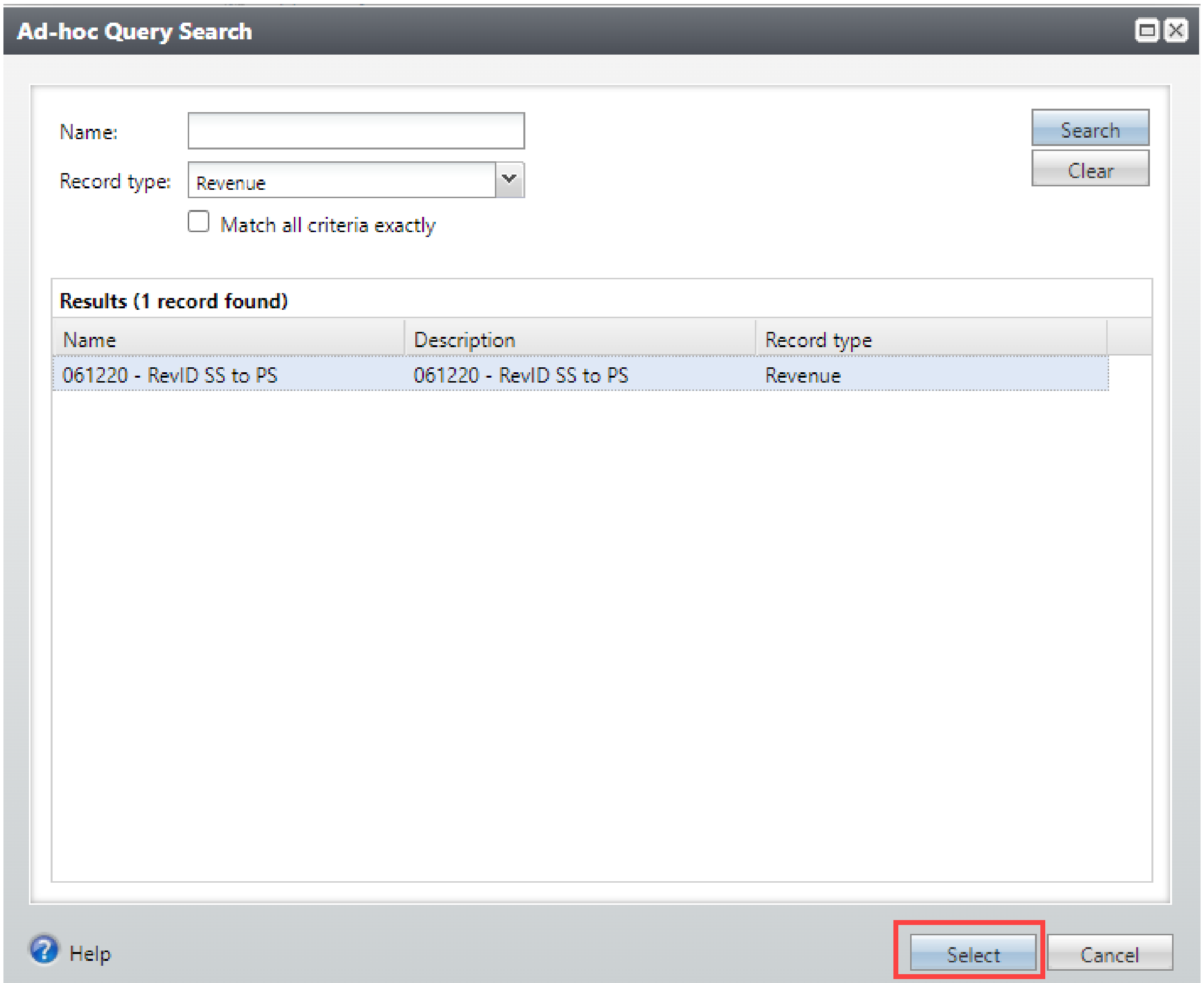
Add documents from query

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

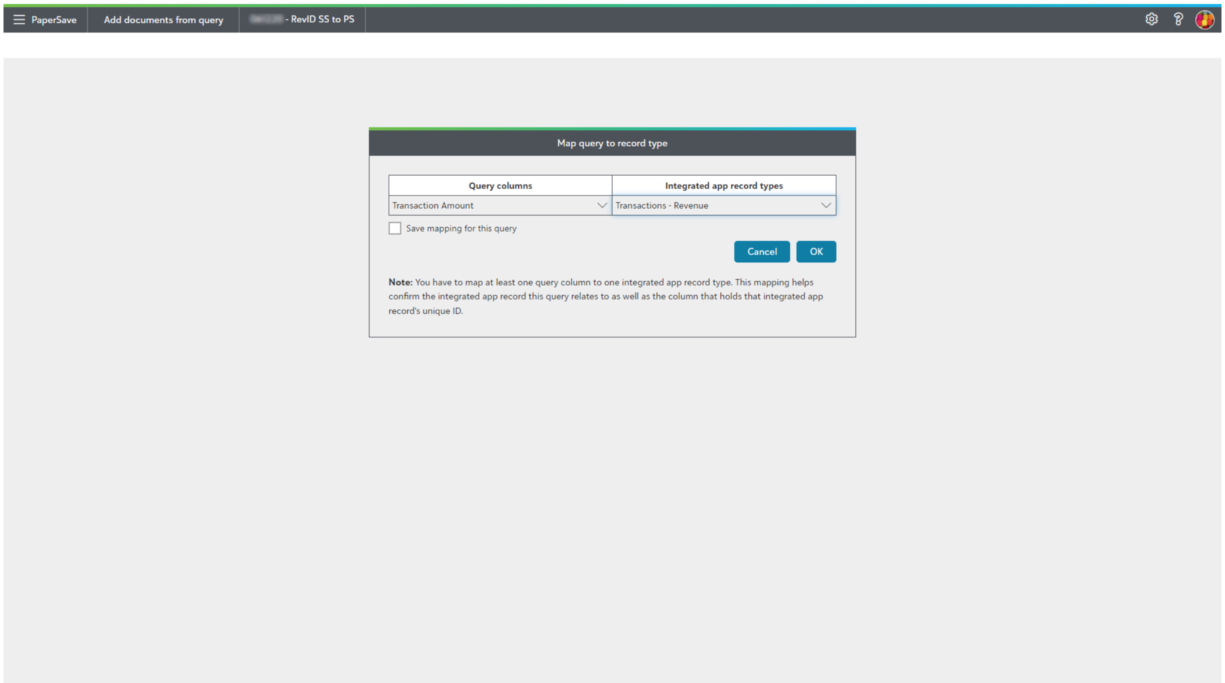
1) Go to “PaperSave" Tab and select **Add Documents from Query** from Ad-Hoc Query Integration group as shown in the below screen.



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 res-ults) and click on **Select** button in dialog box as shown below.

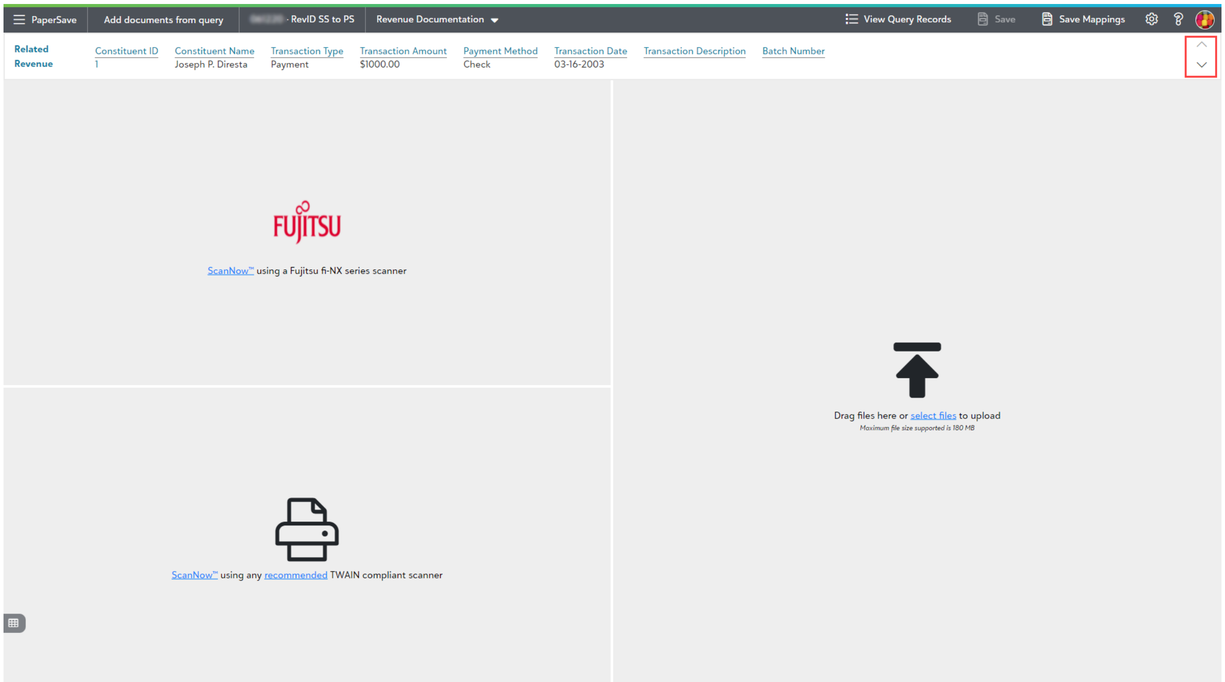


3) You get redirected to PaperSave's "Add documents from query" window in the browser as shown in the below screen. Here, you need to map 'Query columns' with the PaperSave supported Blackbaud CRM Record types in the drop down list and click on **OK** to map the query. You can check the box to **Save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

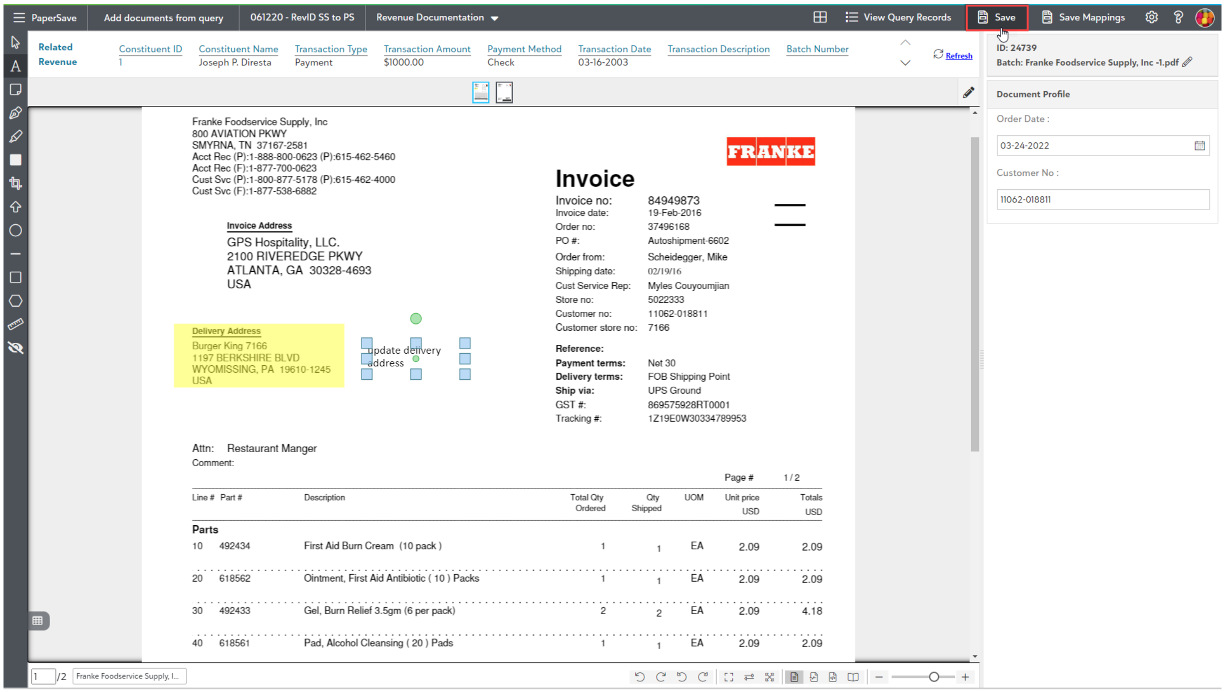
4) Once you click on **OK**, you are redirected to the File capture options panel as shown in the below screen. You can also use the navigation arrows to move to the next record in the query to add a document.



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.

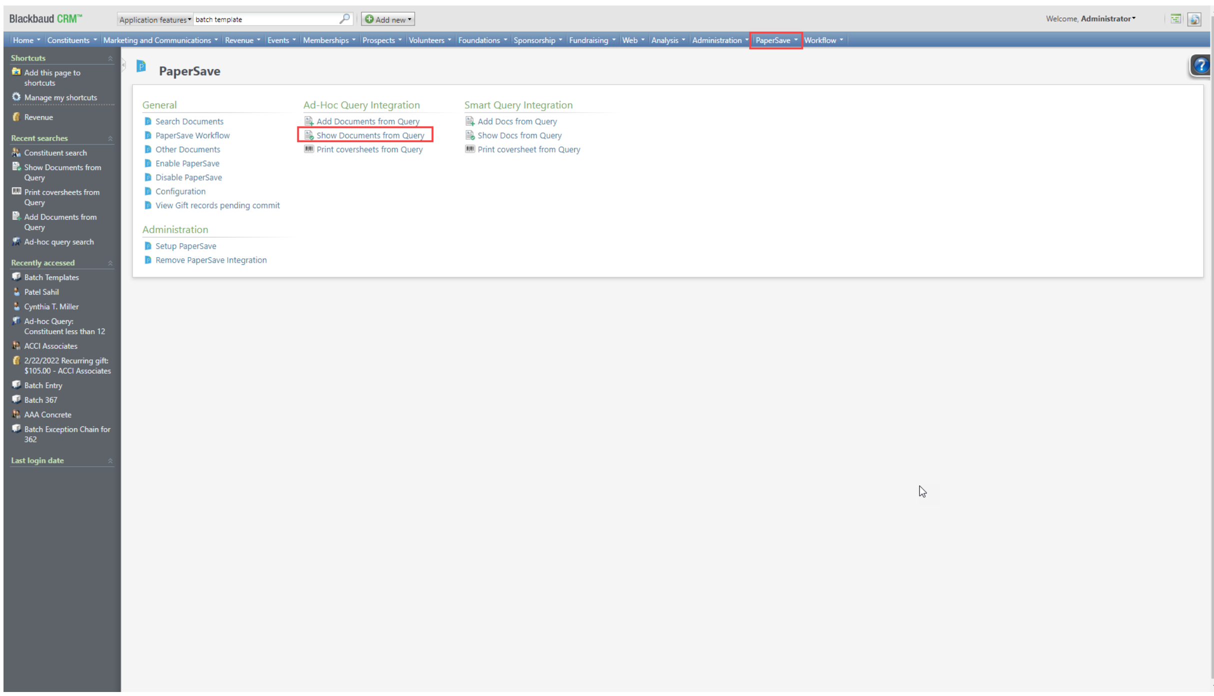


7) To view the saved record and associated documents, you can refer to the Show Documents from Query.

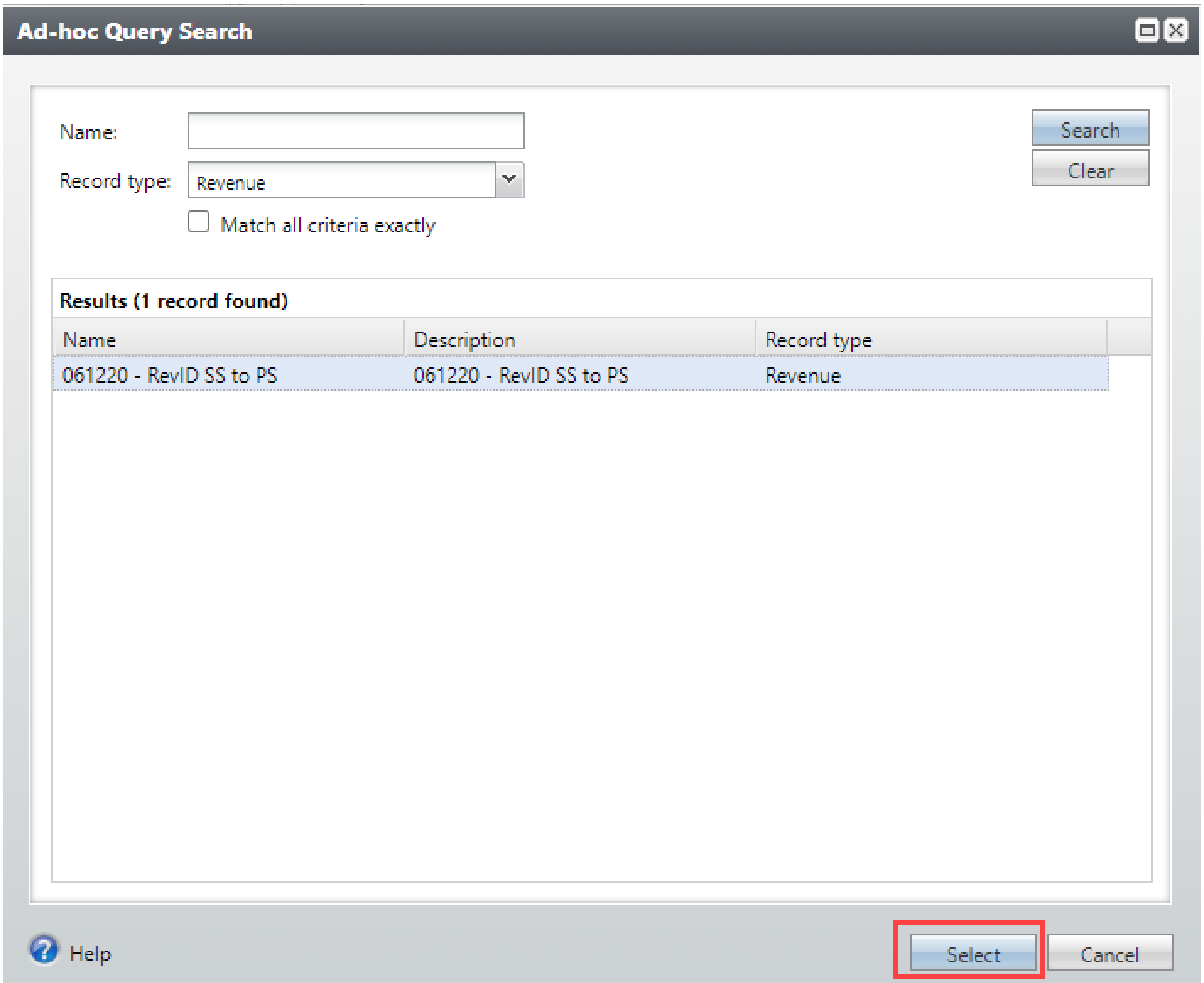
Show documents from query

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.

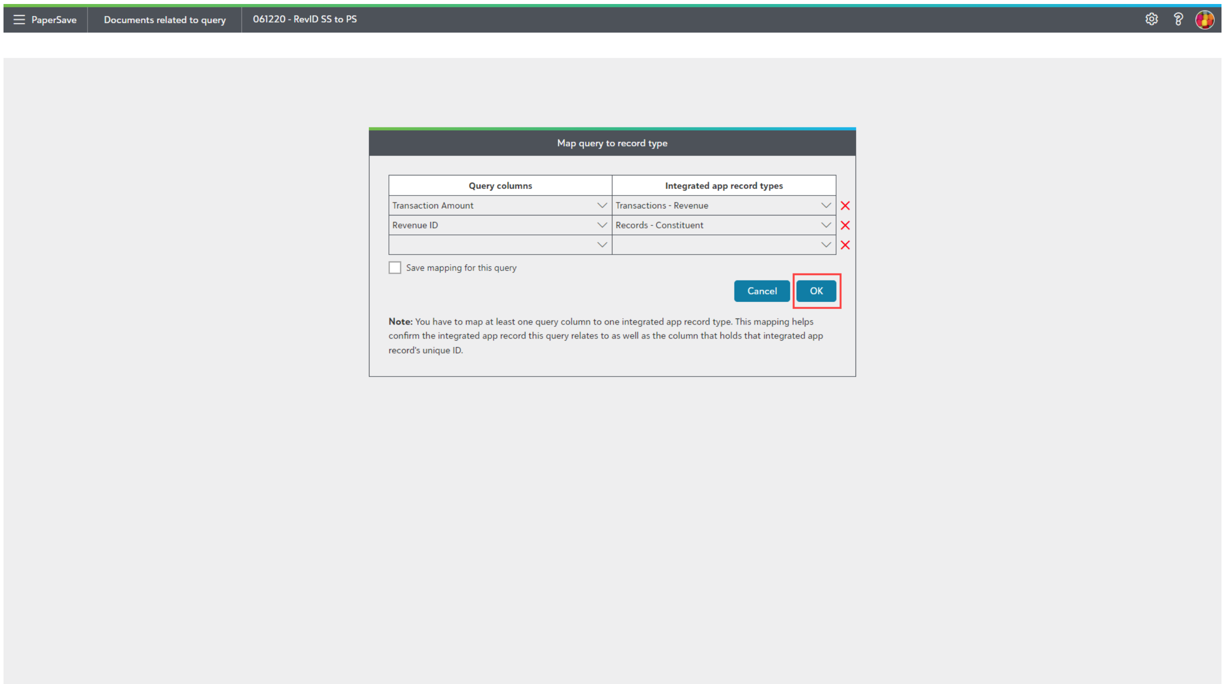


2) An Ad-hoc Query Search dialog box appears. Select Record Type (for example, Revenue) from the drop-down and click on search. Now, Ad-hoc query result appears. Select the desire query (if there are multiple res-ults) and click on **Select** button in dialog box as shown below.

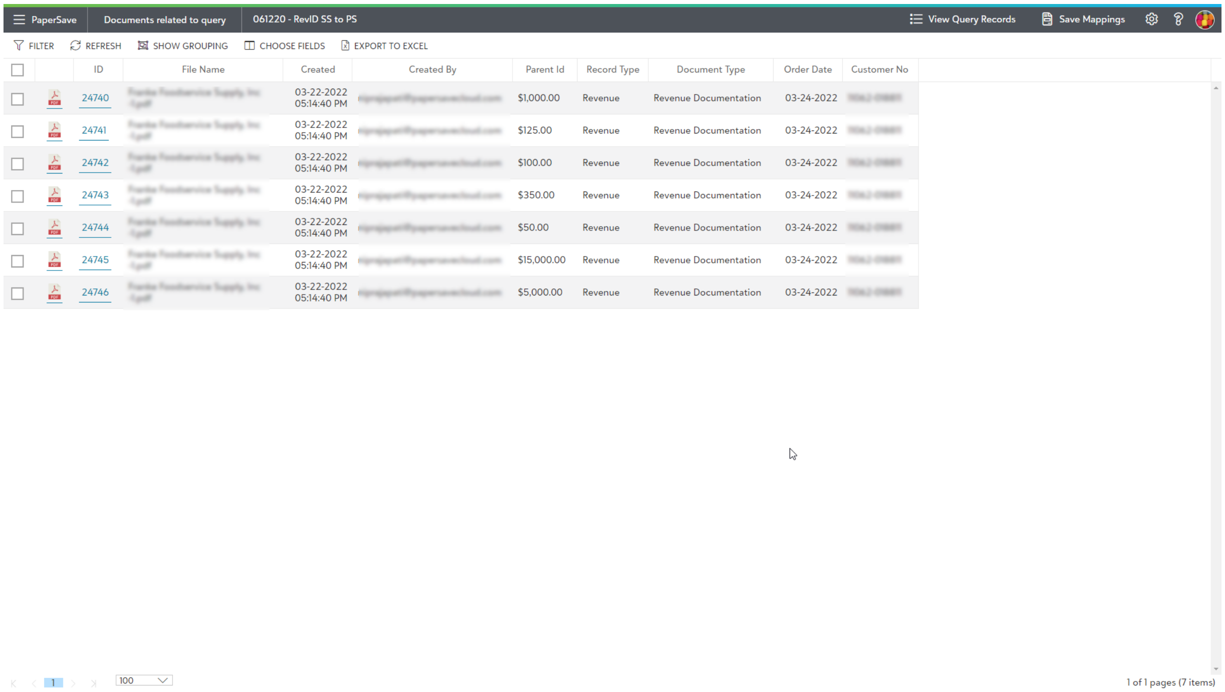


3) Now, you get redirected to the "Documents related to query" window in the browser as shown in the below screen. Here, you have to map multiple query columns with the different record type from the drop down list and click on **OK** to map the query. Also, you can check the box to save the current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



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.

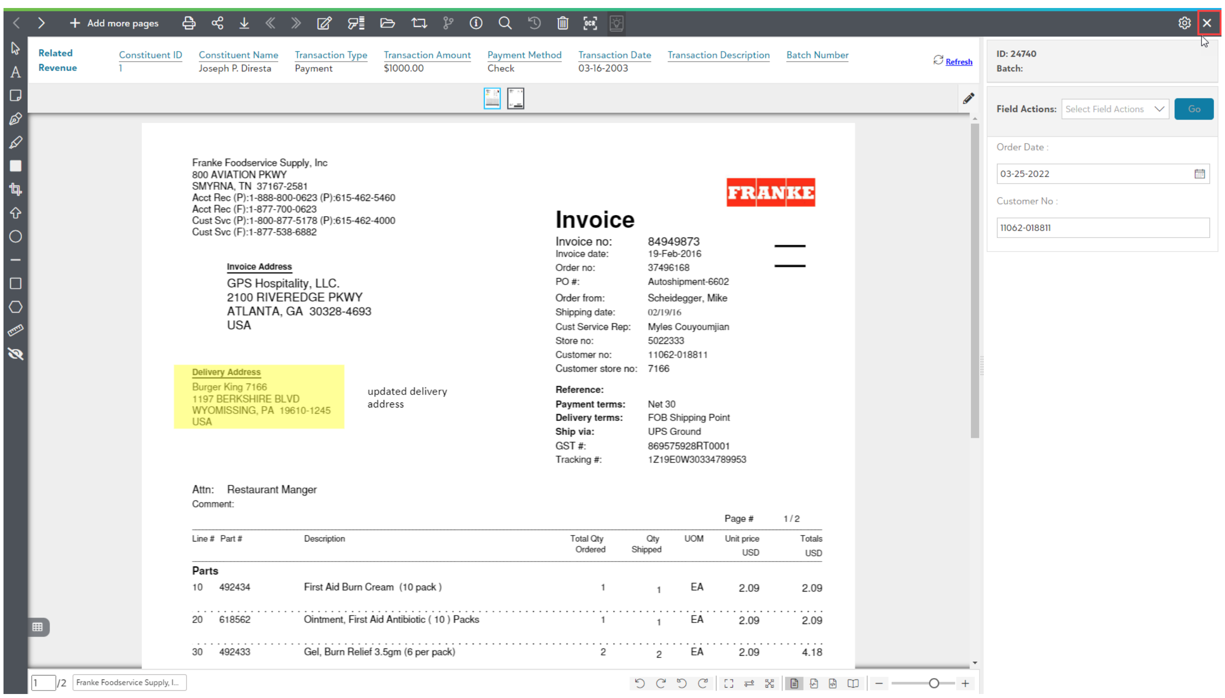
Show Grouping: This options helps you to cluster the items in the list based on the desired header fields. Learn more about Show Grouping.

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.

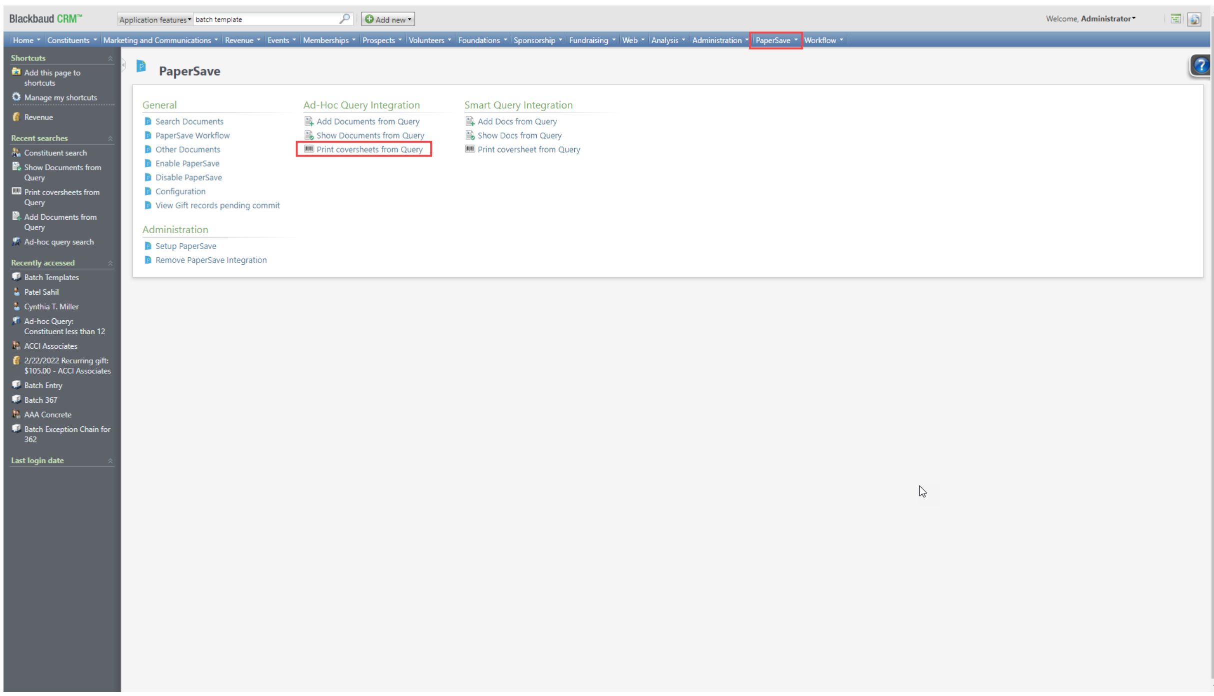
6) Click on the ID hyperlink or double-click on a row to open the document in the item viewer, **validate** the required values in the profile fields, apply annotations (if desired) and click on **X** to update the document within the selected record.



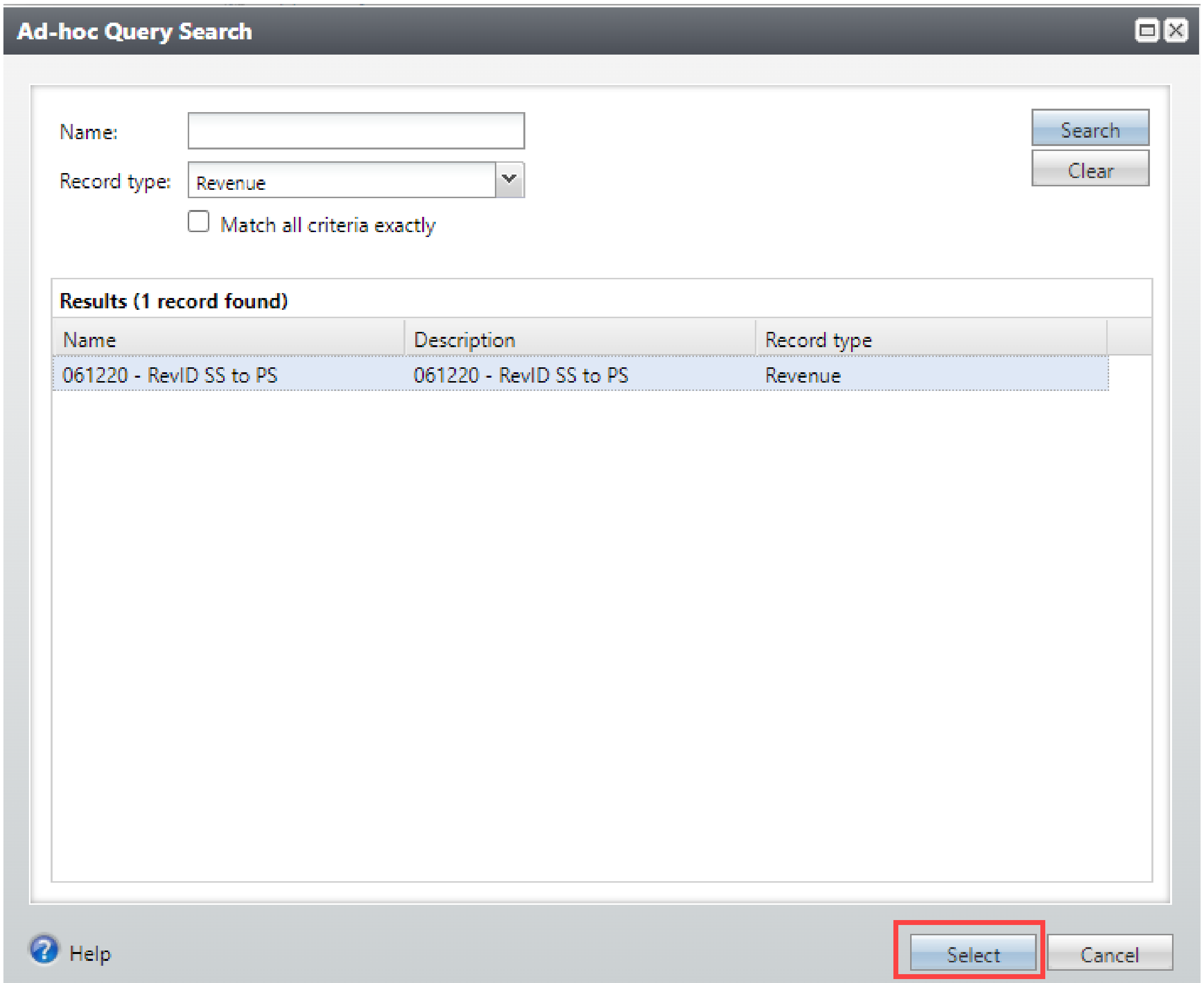
Print coversheets from query

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.

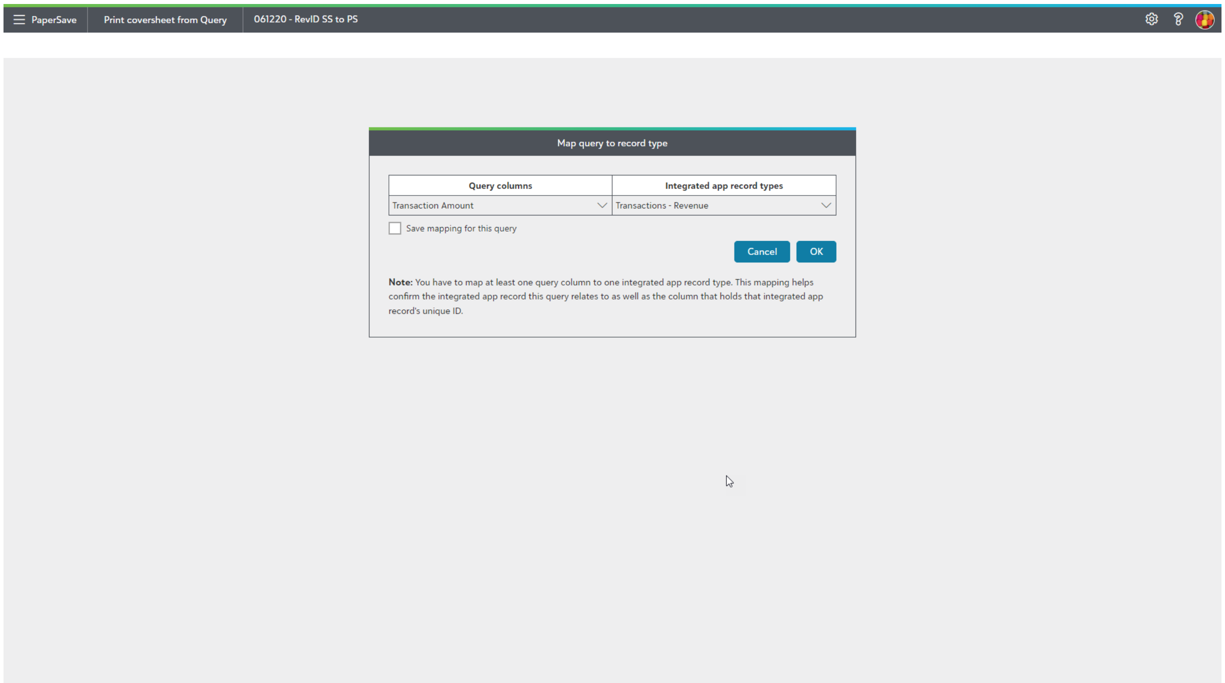


2) An Ad-hoc Query Search dialog box appears. Select Record Type (**for example**, Revenue) from the drop-down and click on search. Now, Ad-hoc query result appears. Select the desire query (if there are multiple res-ults) and click on **Select** button in dialog box as shown below.



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.

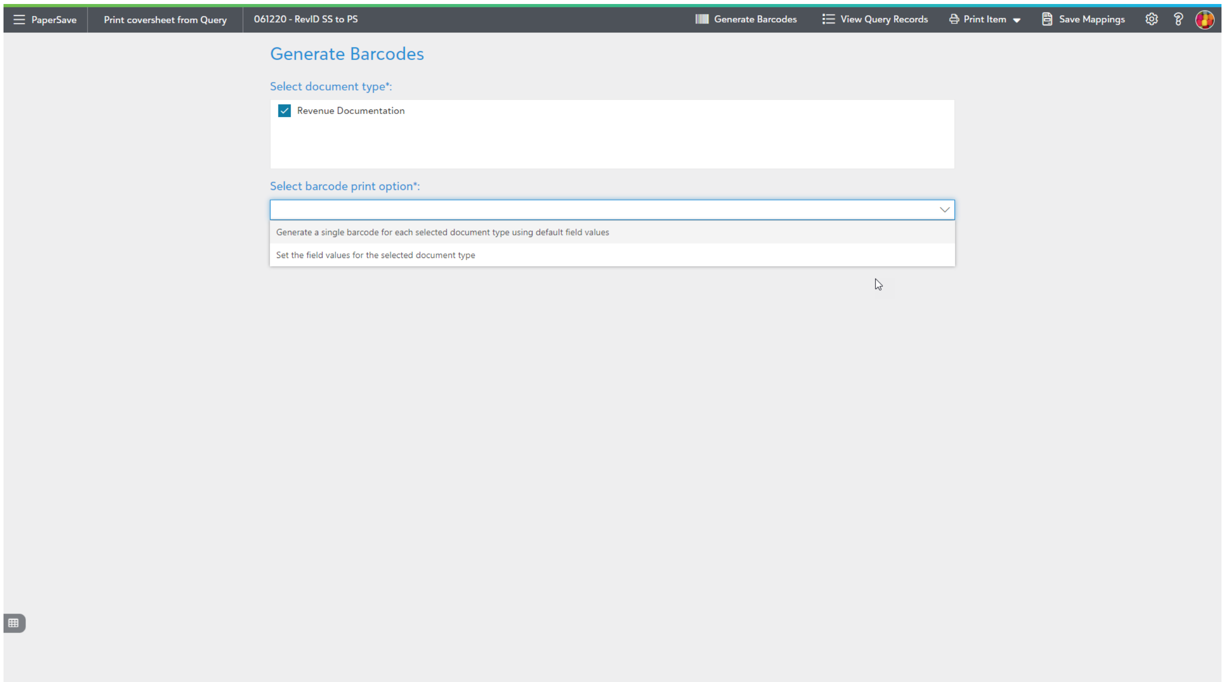
> **Note:** If you save the current mapping, then you will be automatically get redirected to the File capture options page next time when you print coversheet from query for the same Record type.

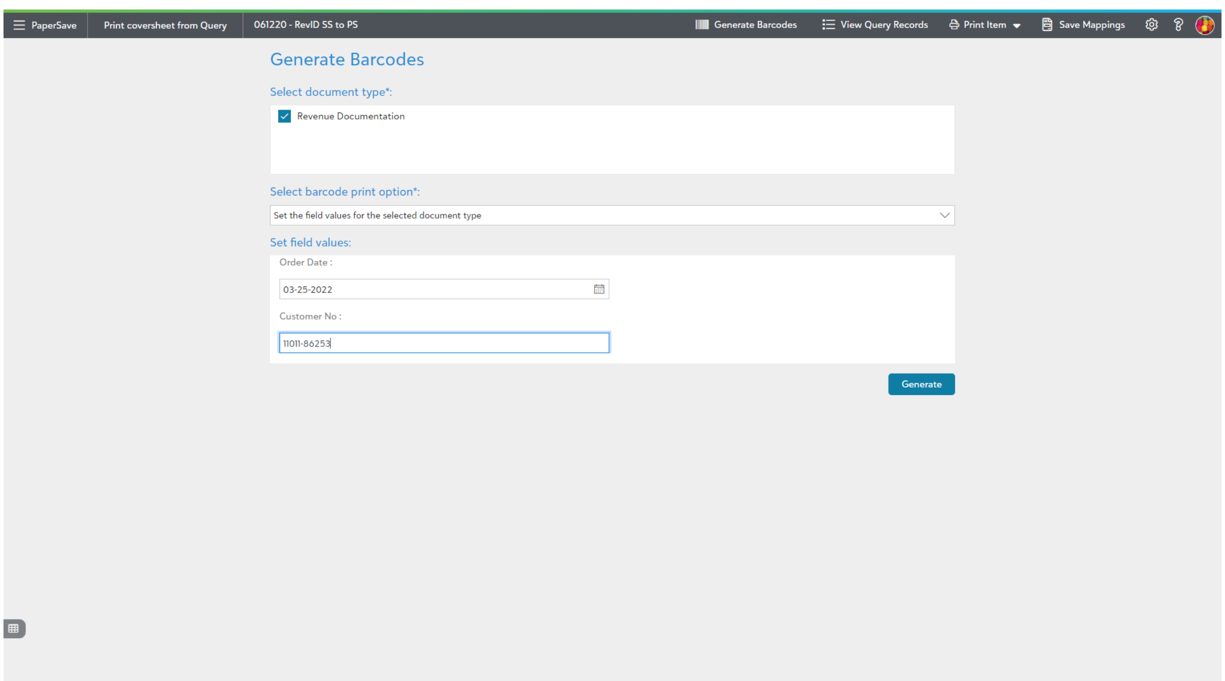


6) Once you click on **OK**, you get prompted with the certain Generate barcodes options as shown below. Here, you can choose the desired document type and any of the following barcode print options, and click on **Generate** button.

- **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.

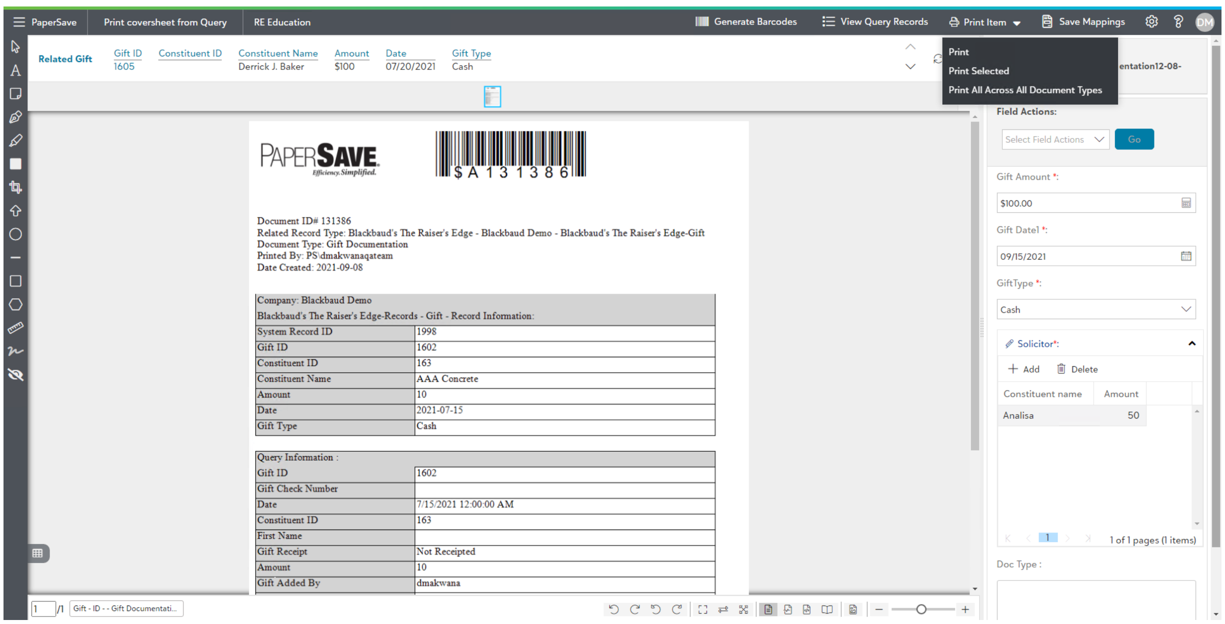
> **Note:** While defining the field values, you must fill all the required fields. Else an error will occur with the message "*All required fields have not been entered for the Document Type: (Name of the selected document type)*"


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.

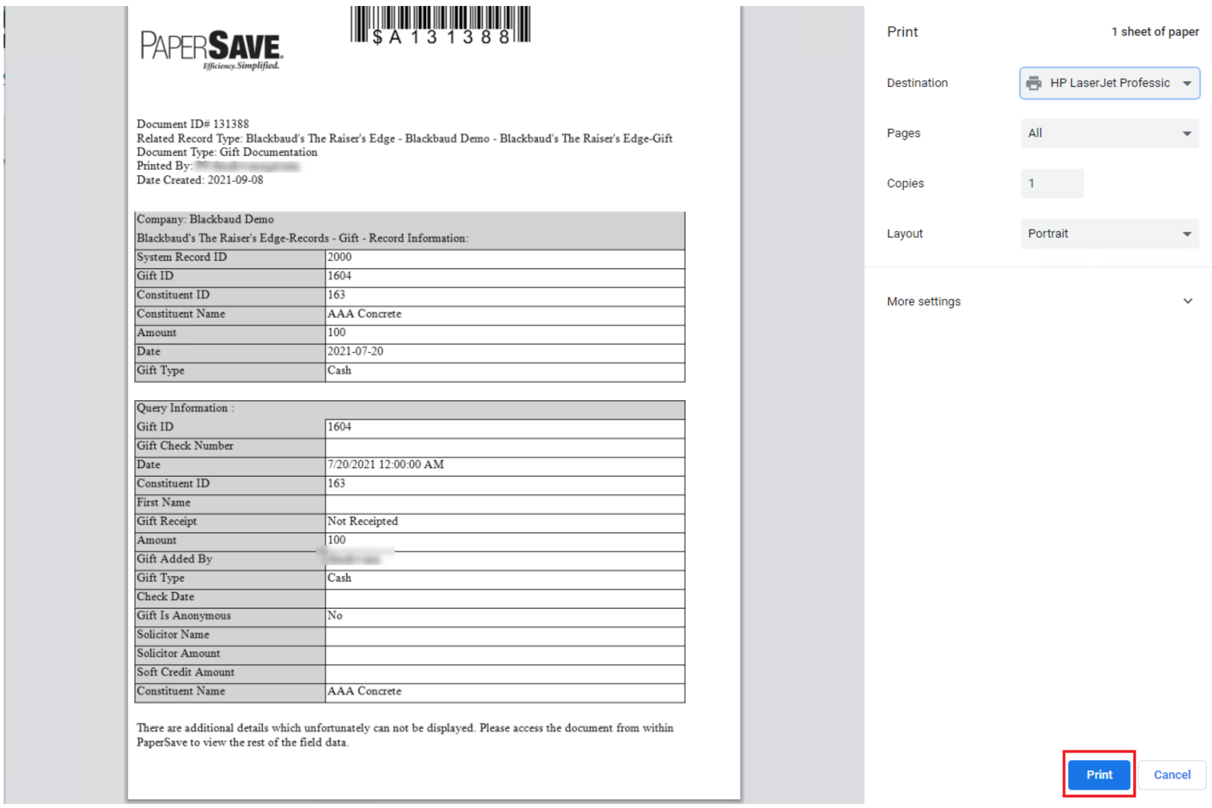
7) Now, a barcode will be generated for all the query records and you will be navigated to an item viewer, as shown below. Here, you can navigate to different PaperSave Areas, Generate another Barcode, view a list of the query records, print the barcodes, and save/clear mappings.

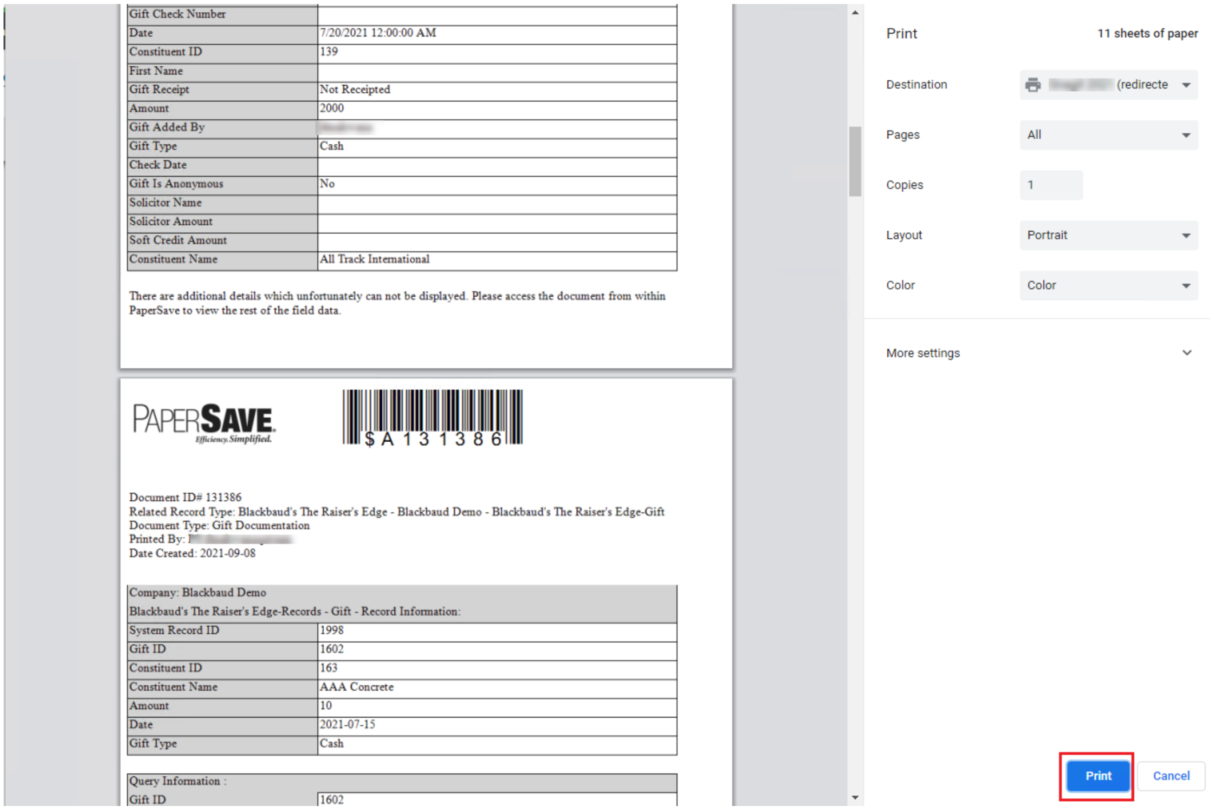


8) Now, click on **Print Item** and select any of the following Print options as per your requirement.

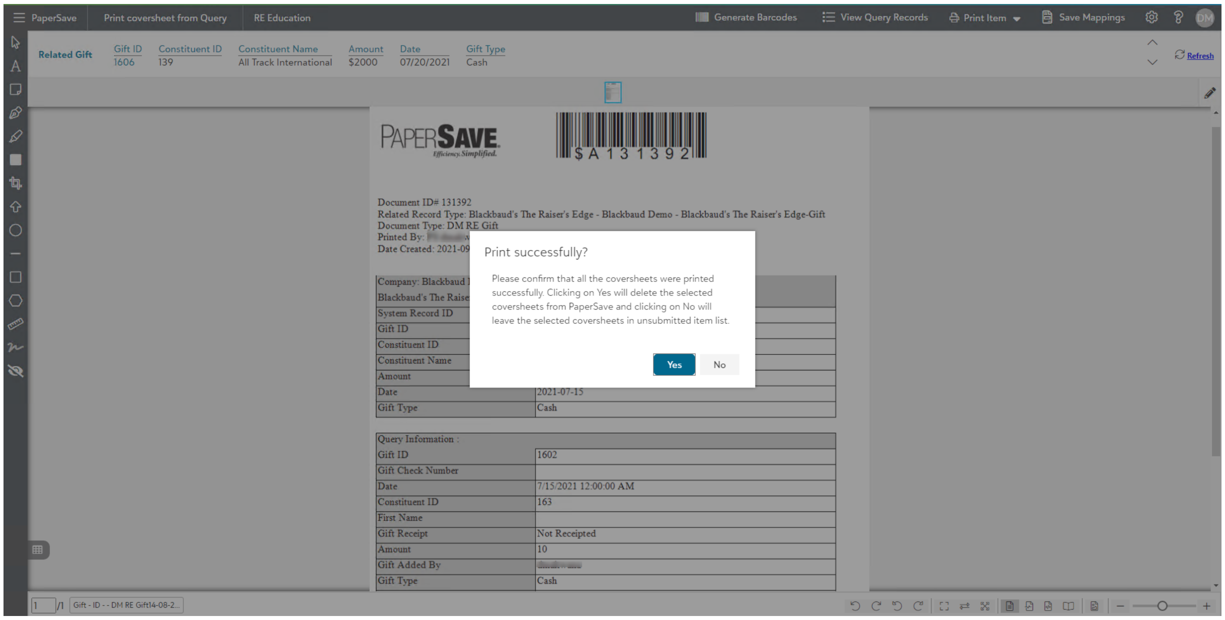
- **Print:** This option will print the coversheet currently displayed in an item viewer.
- **Print Selected:** This option will print the coversheets that you have selected using the checkbox in an unsubmitted item list
- **Print All Across All Document Types:** This option will print all the coversheets 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.





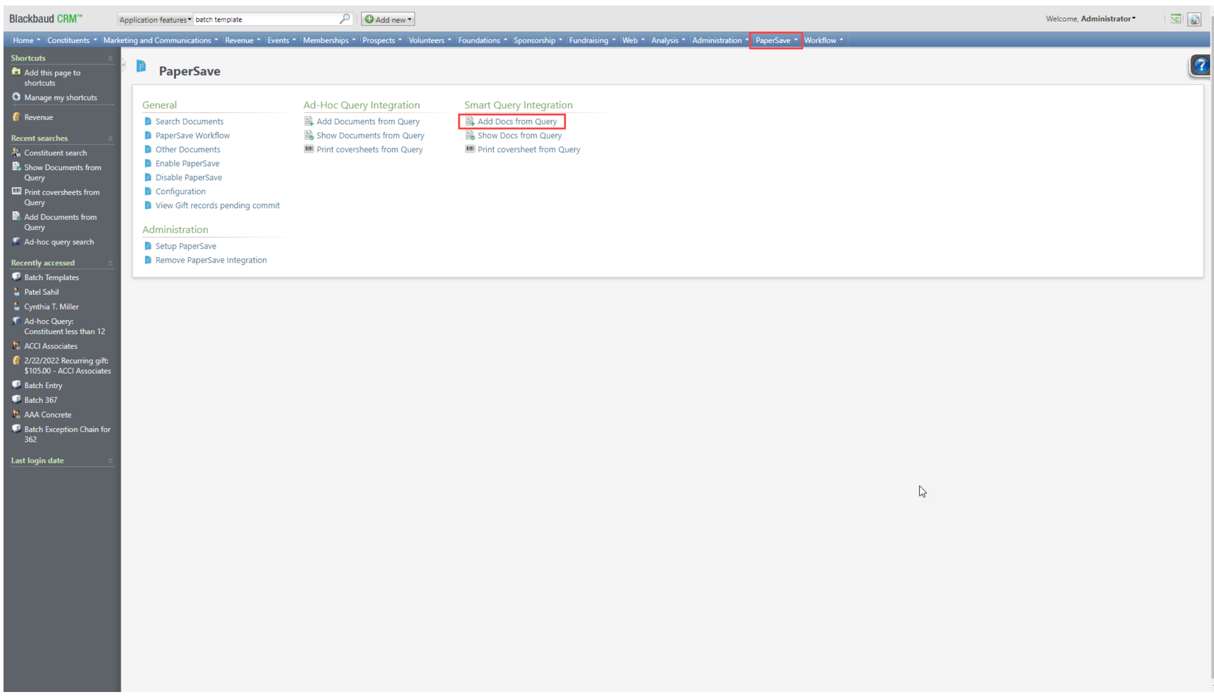
10) After the print operation is performed, a confirmation message will be prompted as shown below. If you click on **Yes**, then it will remove the printed barcode coversheets from the unsubmitted item list and on **No**, it will keep the coversheets in unsubmitted item list so that you can print again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


PaperSave
Print coversheet from Query
RE Education
Generate Barcodes
View Query Records
Print Item
Save Mappings
Related Gift
Gift ID
1606
Constituent ID
139
Constituent Name
All Track International
Amount
$2000
Date
07/20/2021
Gift Type
Cash
Refresh
PAPERSAVE
Efficiency. Simplified.
$A131392
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:
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.
Yes
No
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 Receipted
Amount
10
Gift Added By
Gift Type
Cash

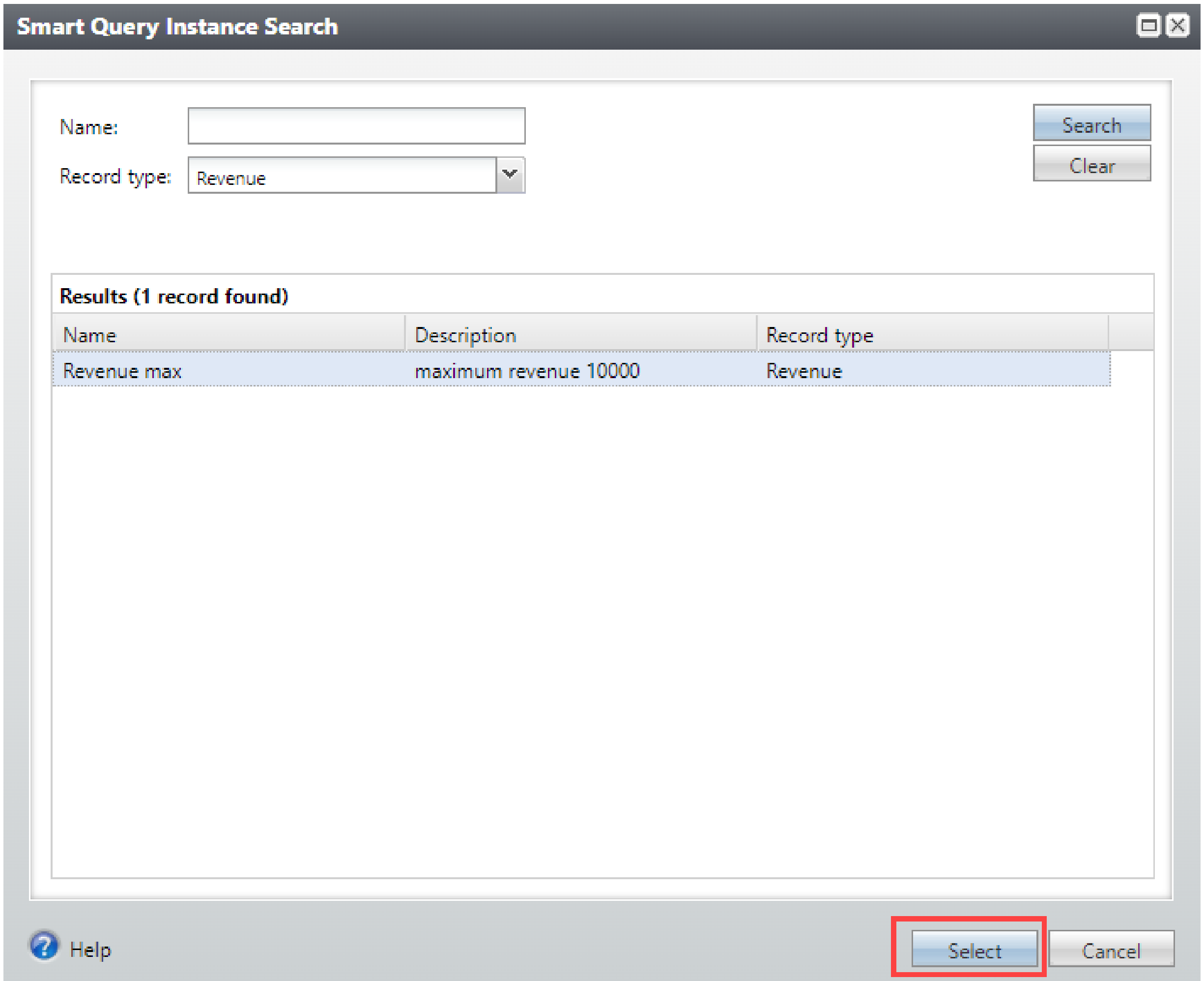
Add docs from query

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.

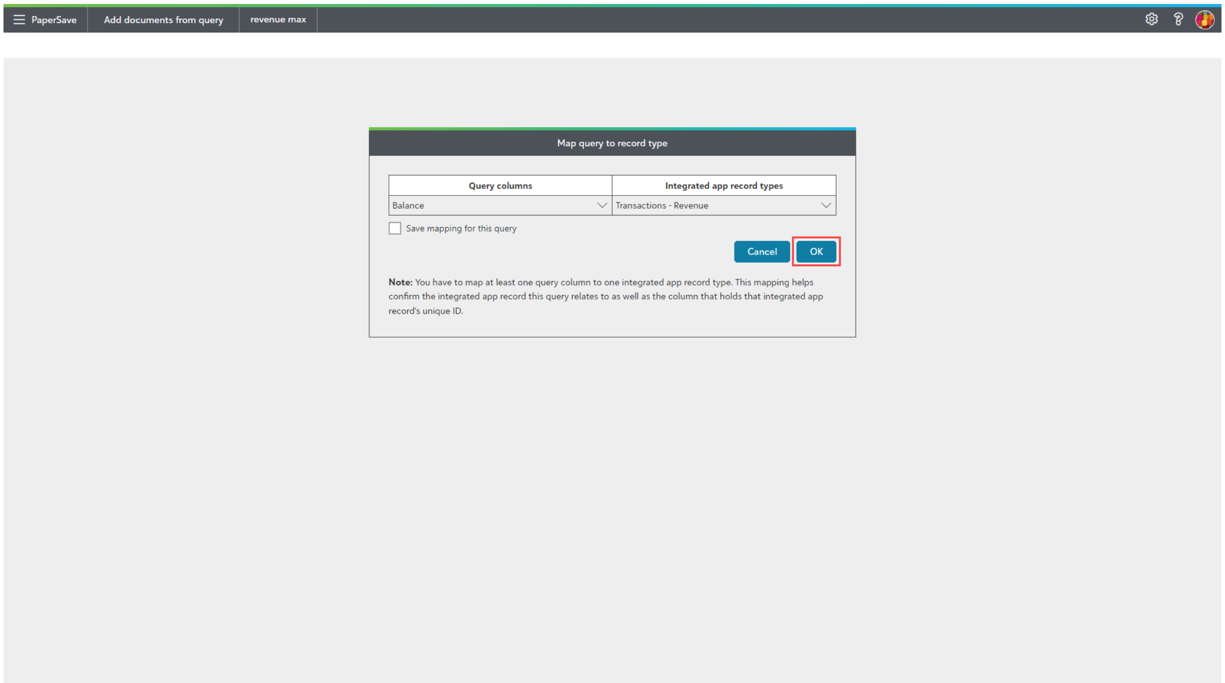


2) A Smart Query Instance Search dialog box appears. Select Record Type (for example, Revenue) from the drop-down and click on search. Now, smart query result appears. Select the desire query (if there are multiple results) and click on **Select** button in dialog box as shown below.

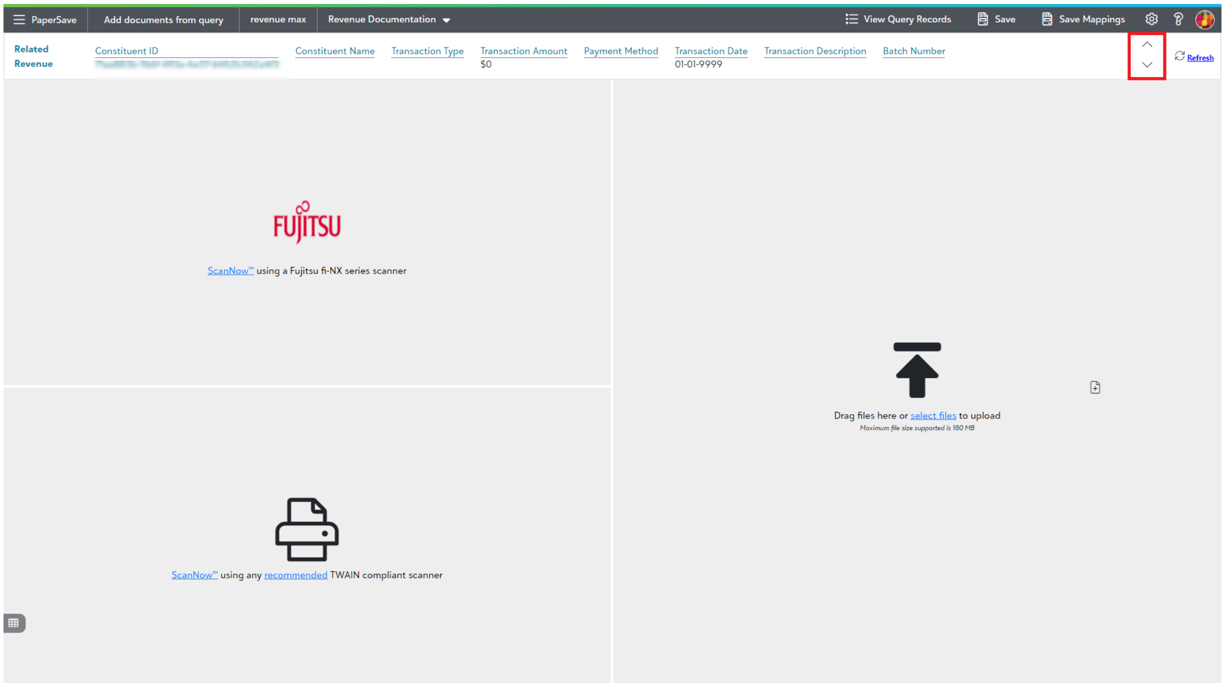


2) You get redirected to PaperSave's "Add documents from query" window in the browser as shown in the below screen. Here, you need to map 'Query columns' with the PaperSave supported Blackbaud CRM record types in the drop down list and click on **OK** to map the query. You can check the box to "**Save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



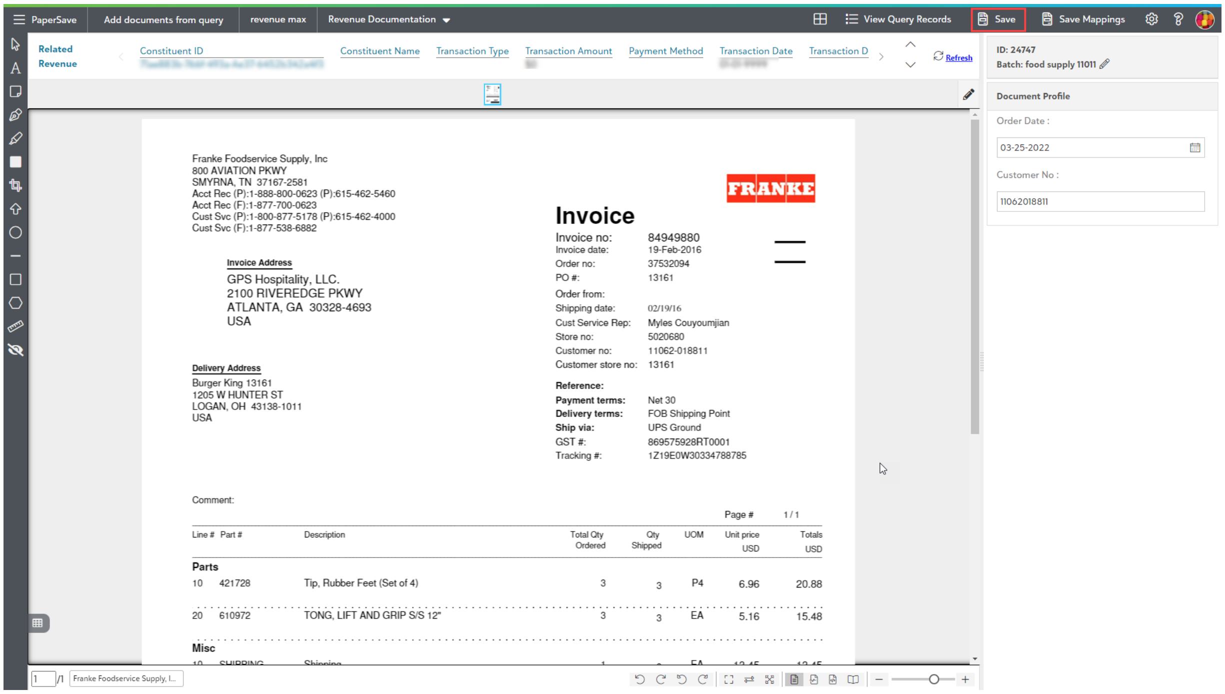
3) Once you click on **OK**, you are redirected to the File capture options panel as shown in the below screen. You can also use the navigation arrows to move to the next record in the query to add a document.



4) 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.

5) Once you have acquired the document, you are 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.

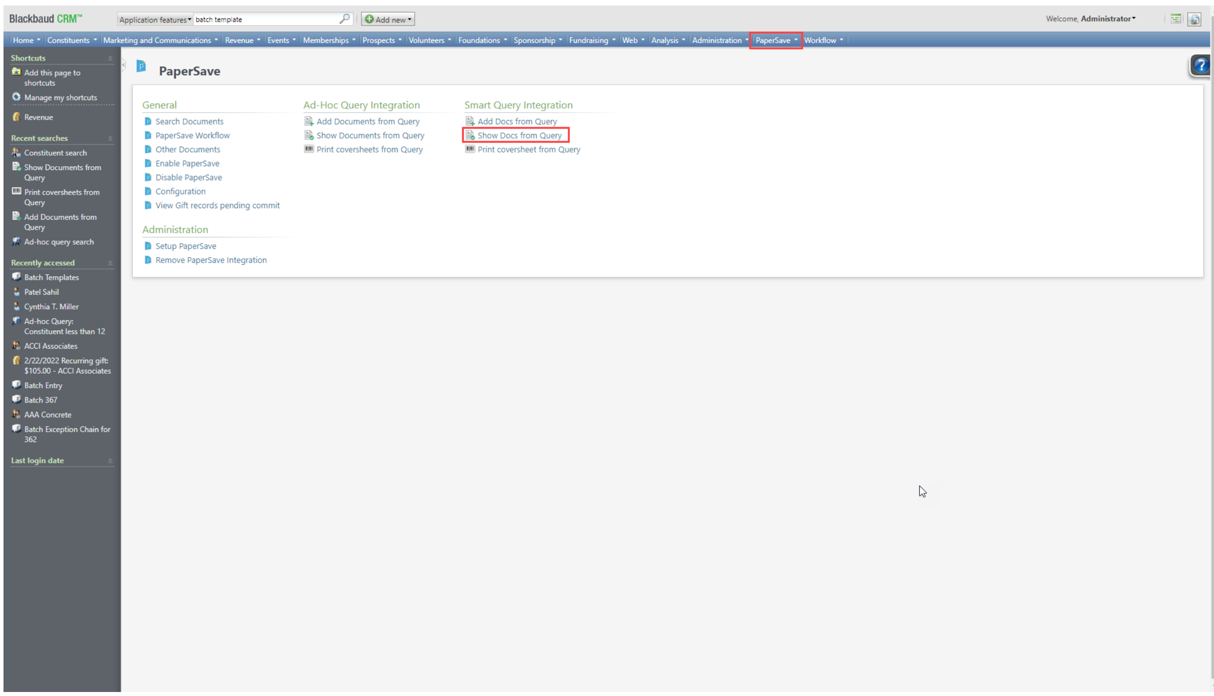


6) To view the saved record and associated documents, you can refer to the Show Documents from Query.

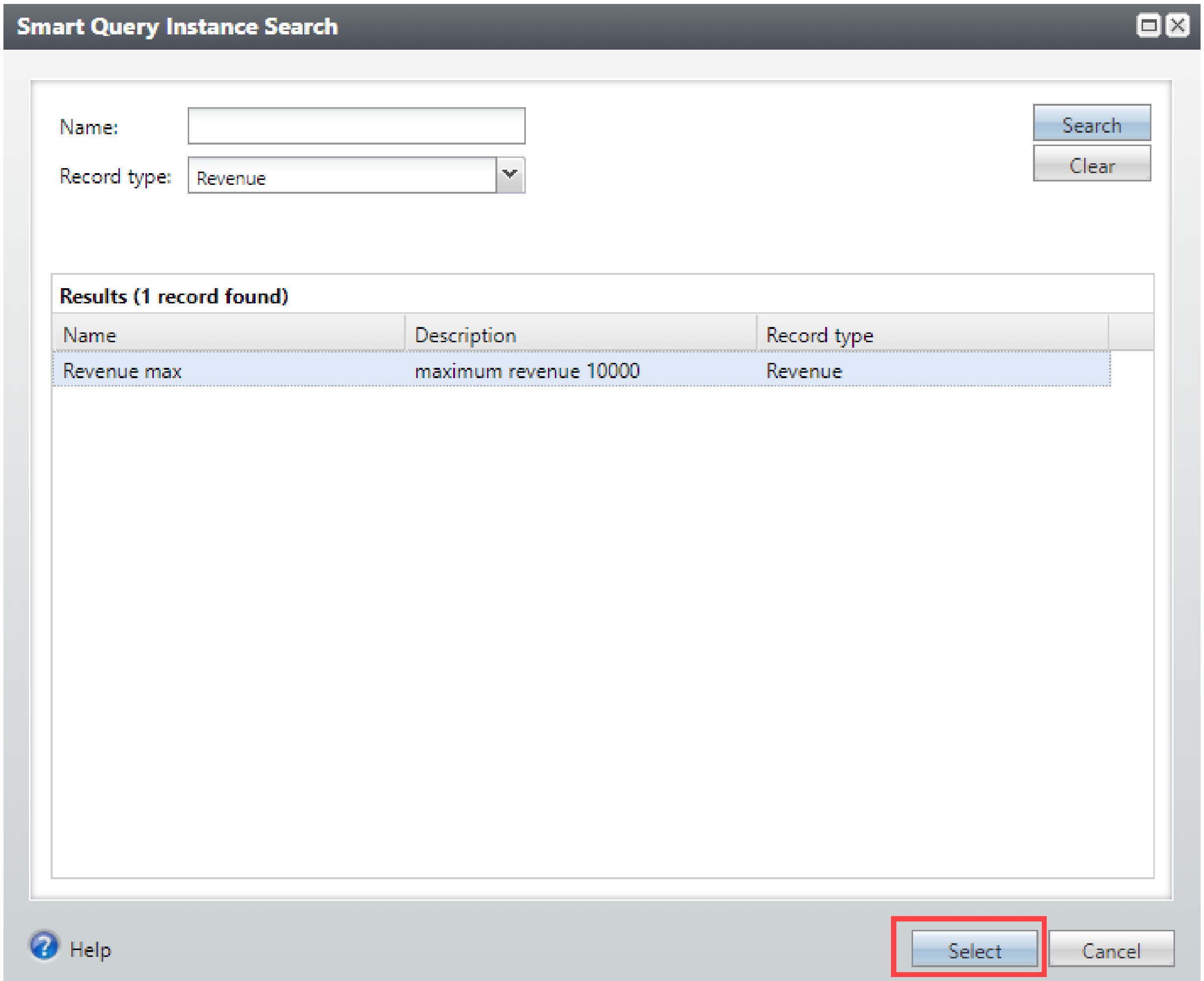
Show docs from query

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.

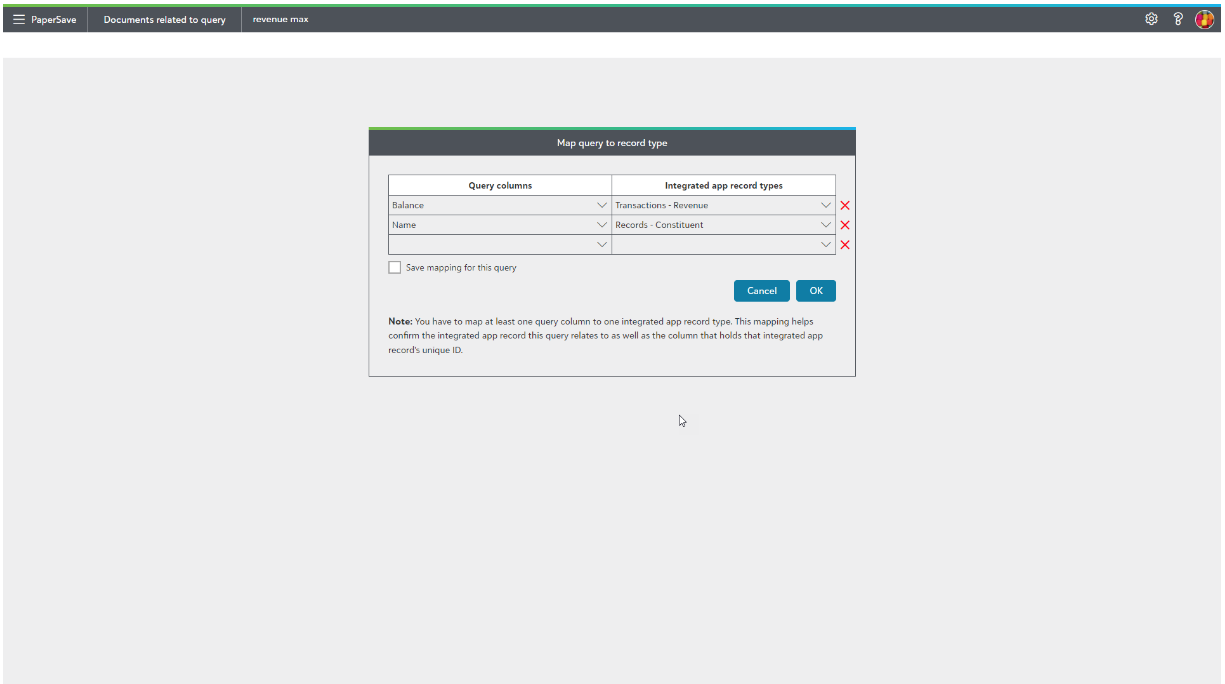


2) A Smart Query Instance Search dialog box appears. Select Record Type (for example, Revenue) from the drop-down and click on search. Now, smart query result appears. Select the desire query (if there are multiple results) and click on **Select** button in dialog box as shown below.

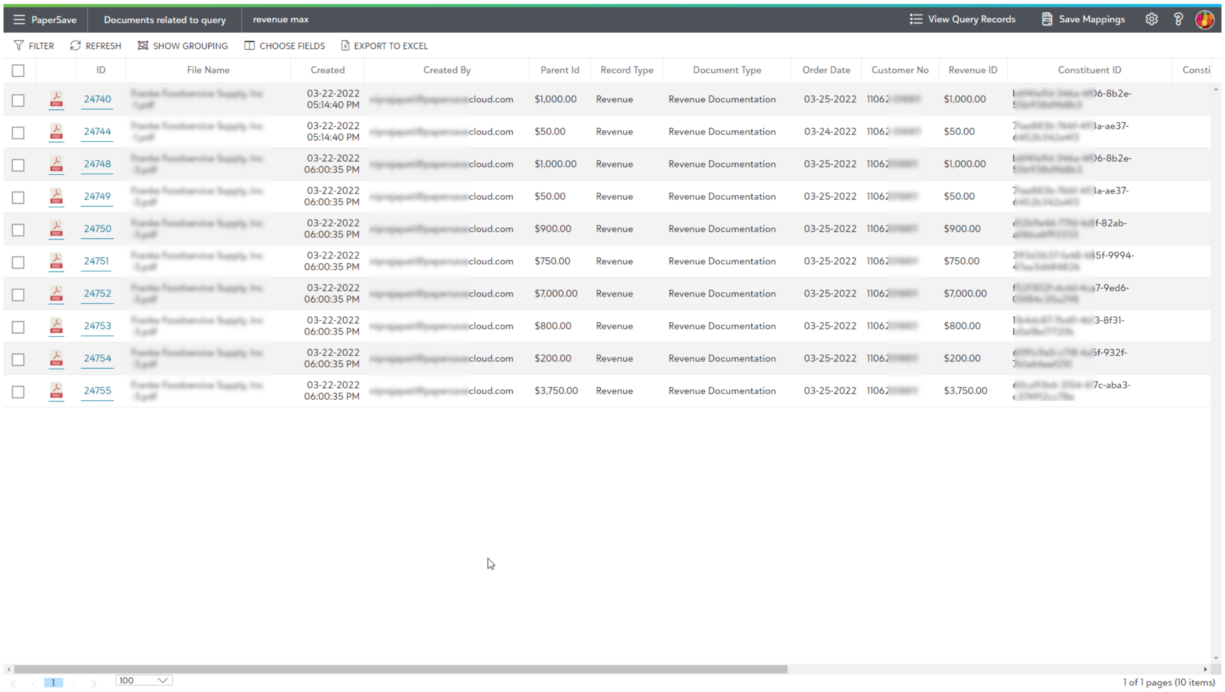


5) Now, you will be redirected to the "Documents related to query" window in the browser as shown in the below screen. Here, you have to map multiple query columns with the different record type from the drop down list and click on **OK** to map the query. Also, you can check the box to save the current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



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.

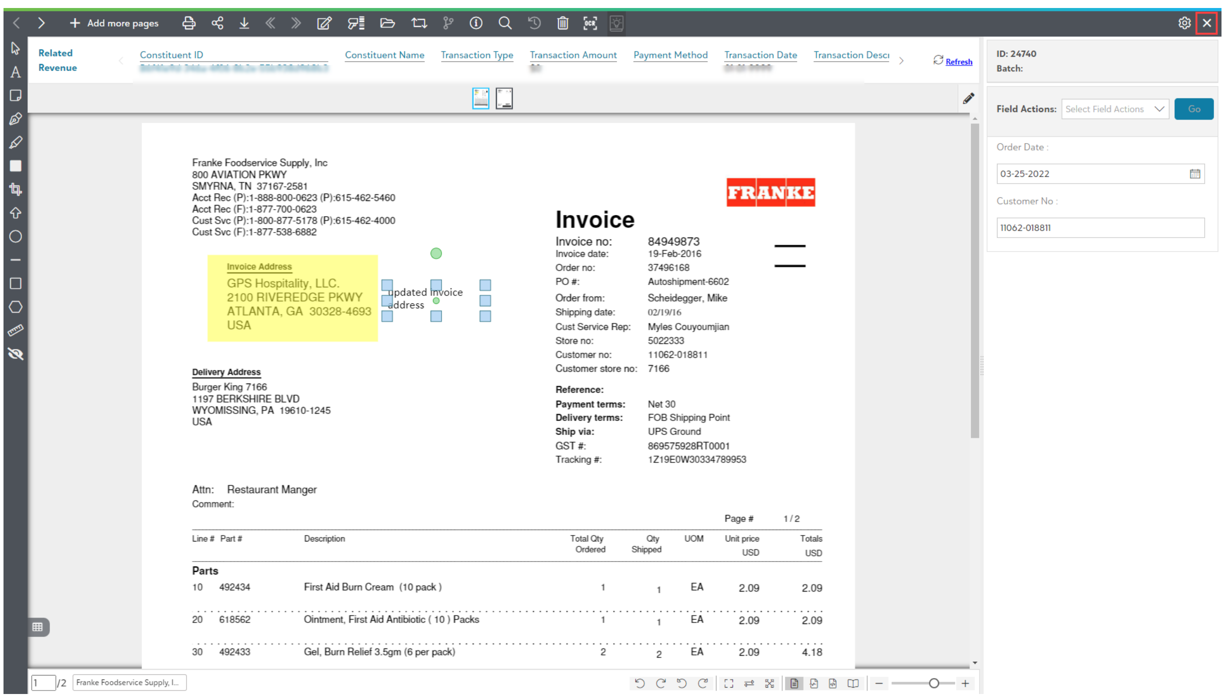
Show Grouping: This options helps you to cluster the items in the list based on the desired header fields. Learn more about Show Grouping.

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.

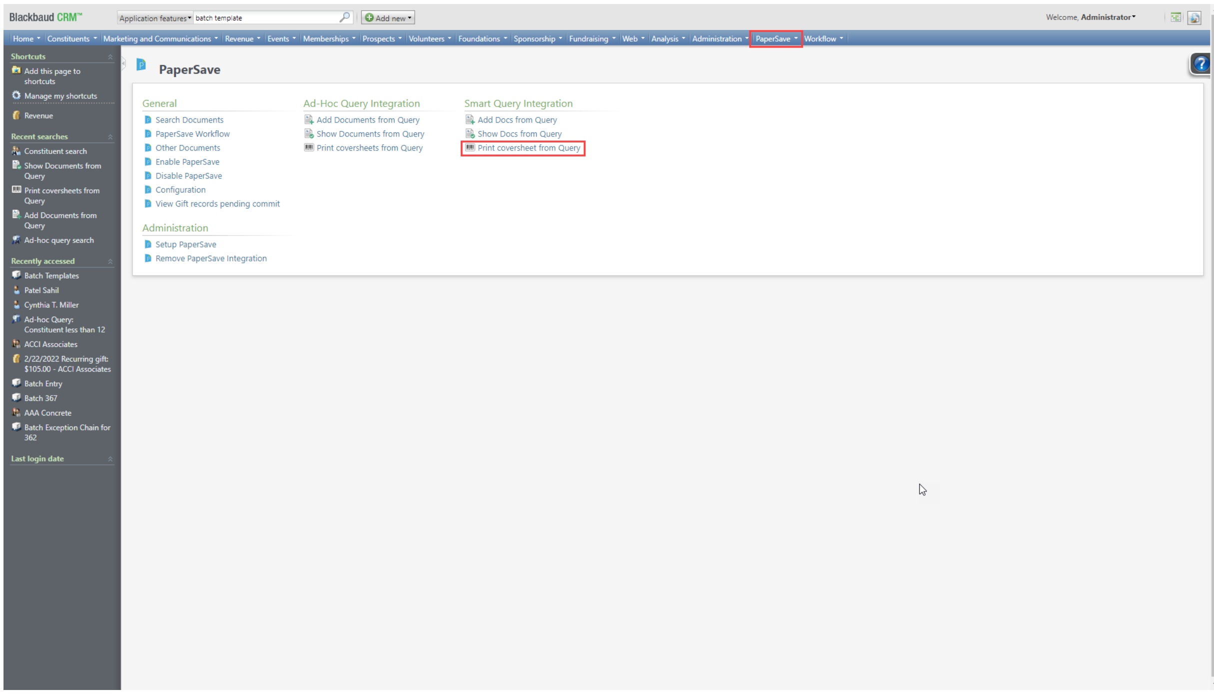
> **Note:** When you save the current mapping, you wouldn't have to map the fields again in future. If the mappings are saved, then **Save Mappings** title will be changed to **Clear Mappings**. You can click on **Clear Mappings** to create the new mappings.

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.



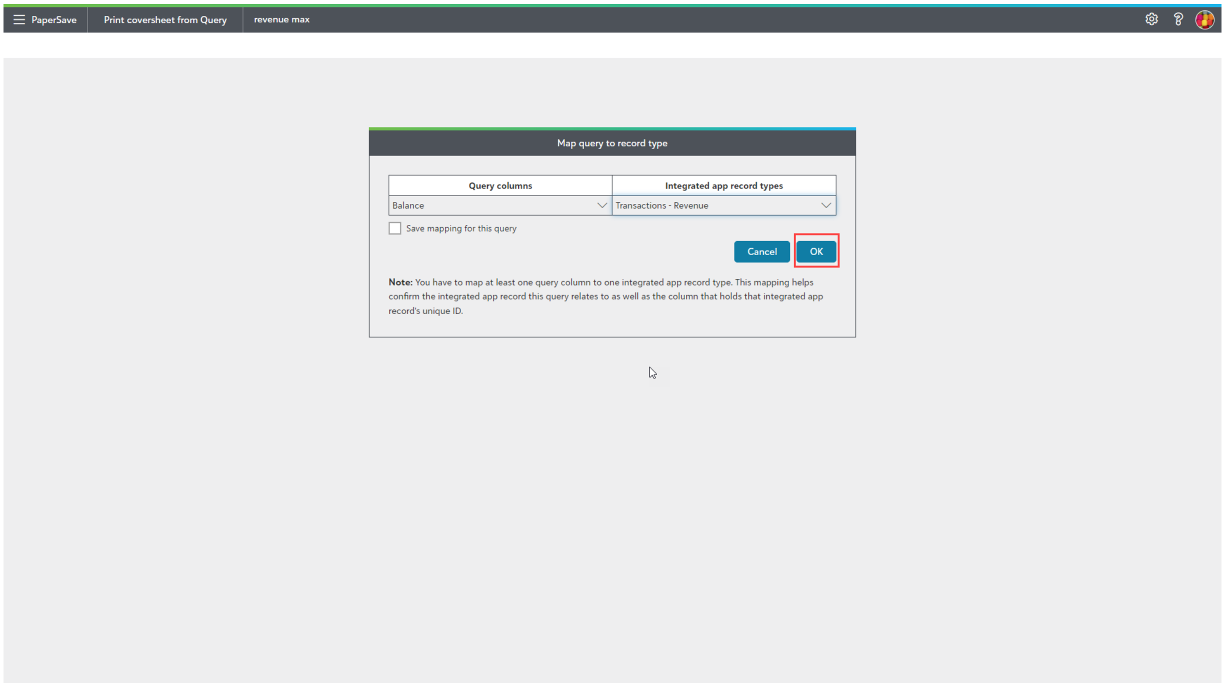
Print coversheets from query

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.

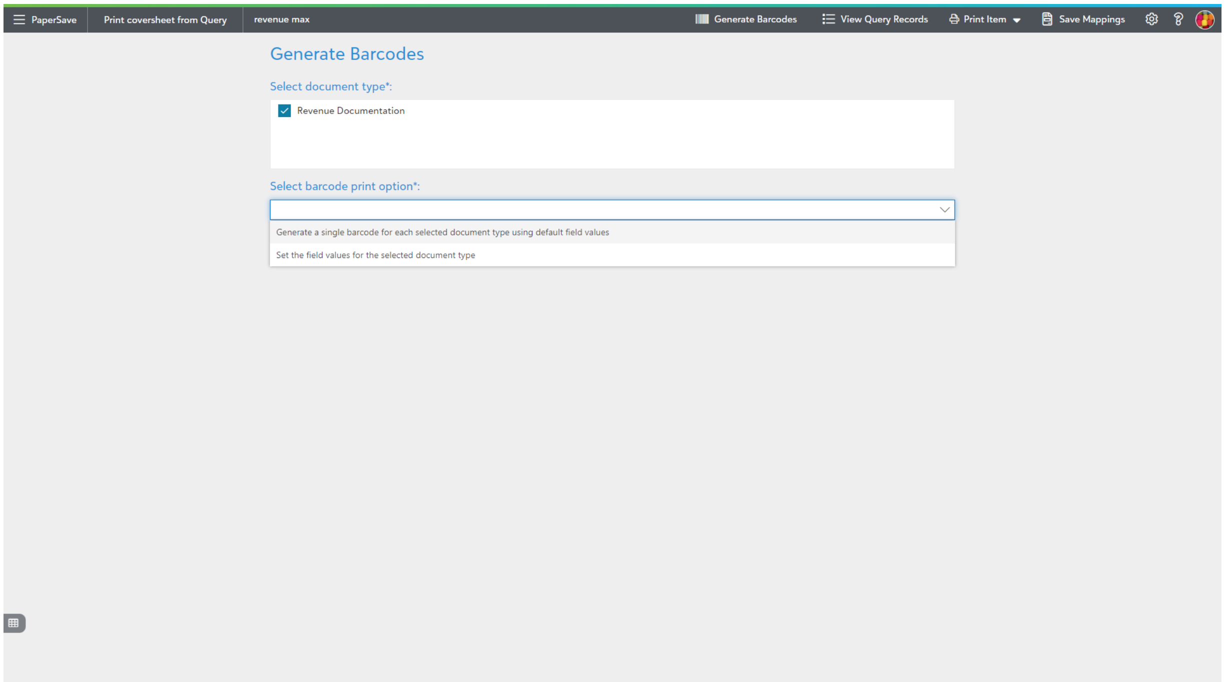
> **Note:** If you save the current mapping, then you will be automatically redirected to the File capture options page the next time when you print coversheet from query for the same Record type.

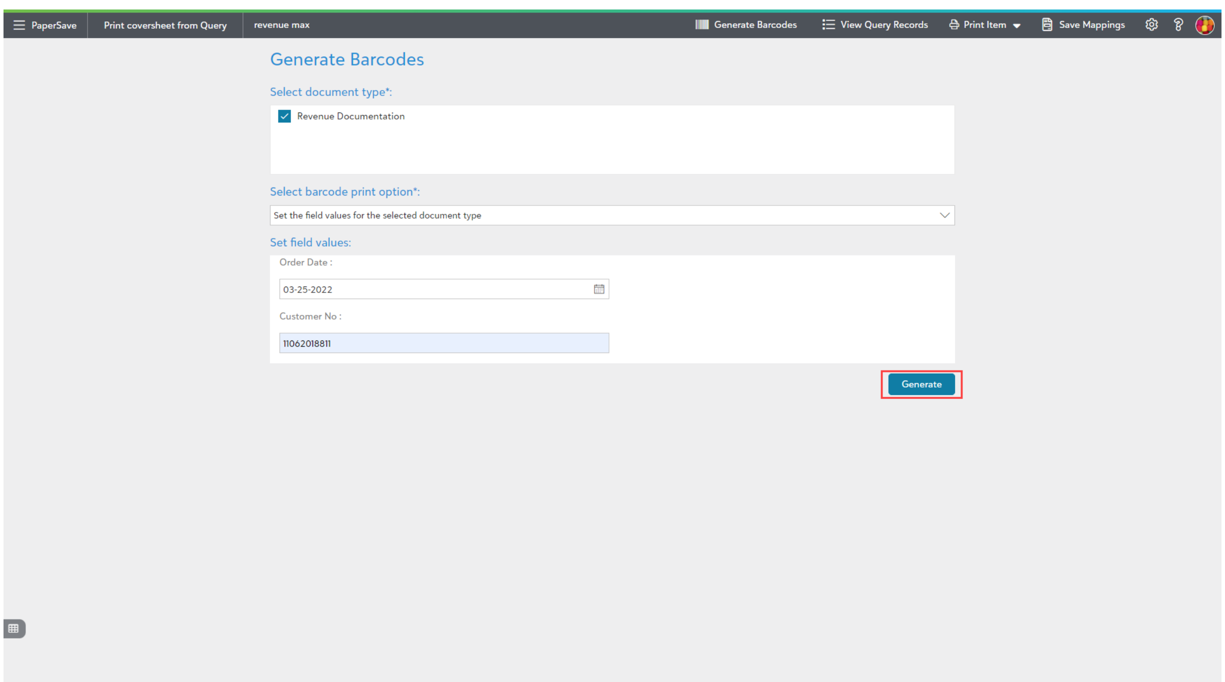


6) Once you click on **OK**, you will be prompted with the certain Generate barcodes options as shown below. Here, you can choose the desired document type and any of the following barcode print options, and click on **Generate** button.

- **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.

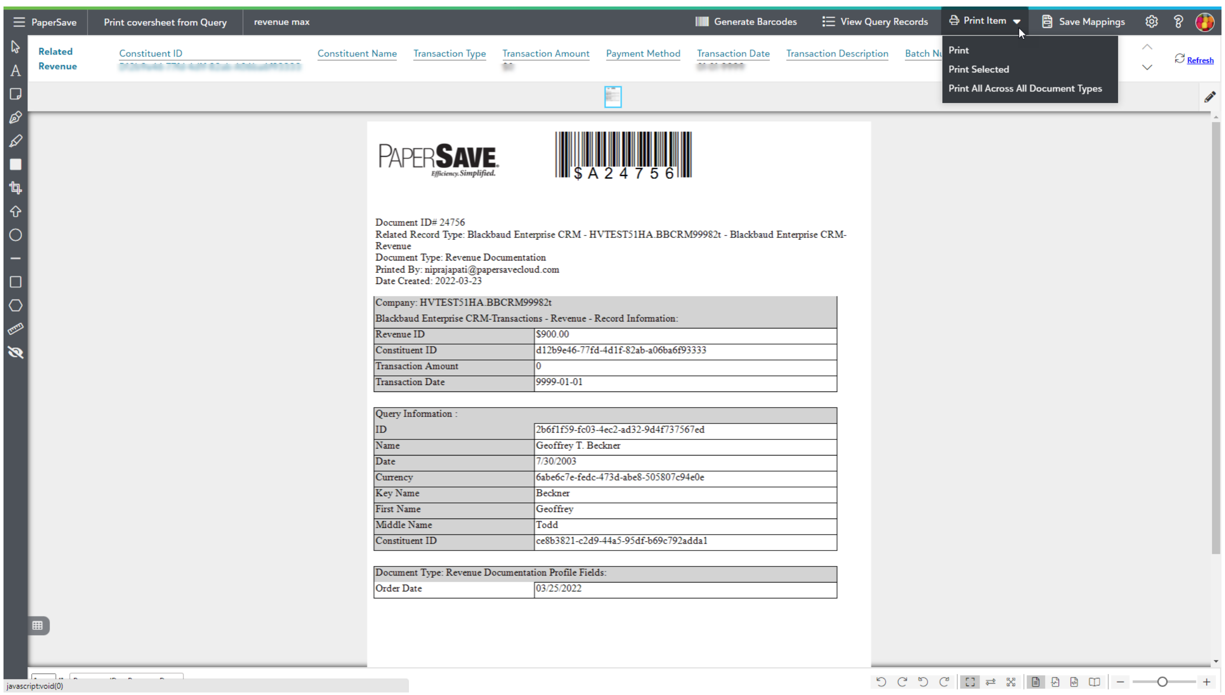
> **Note:** While defining the field values, you must fill all the required fields. Else an error will occur with the message "*All required fields have not been entered for the Document Type: (Name of the selected document type)*"


PaperSave
Print coversheet from Query
revenue max
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
revenue max
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 :
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.

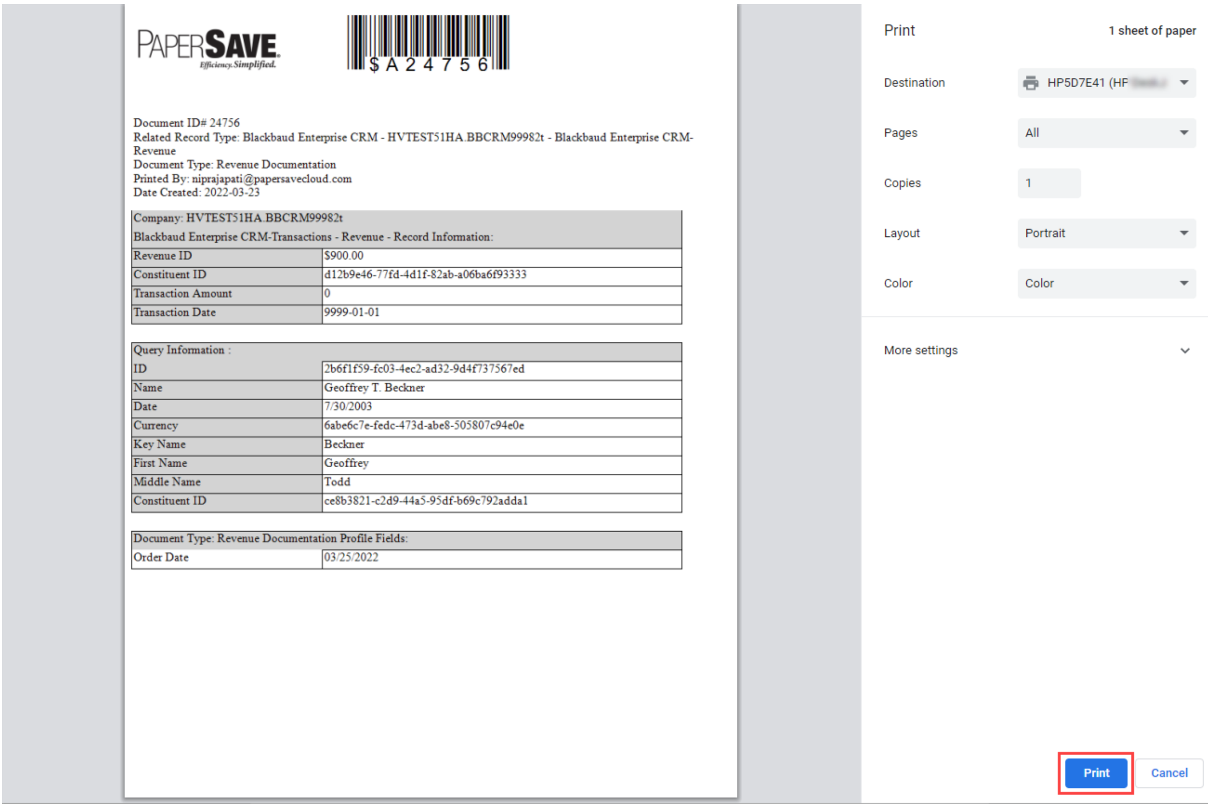
7) Now, a barcode will be generated for all the query records and you will be navigated to an item viewer, as shown below. Here, you can navigate to different PaperSave Areas, Generate another Barcode, view a list of the query records, print the barcodes, and save/clear mappings.



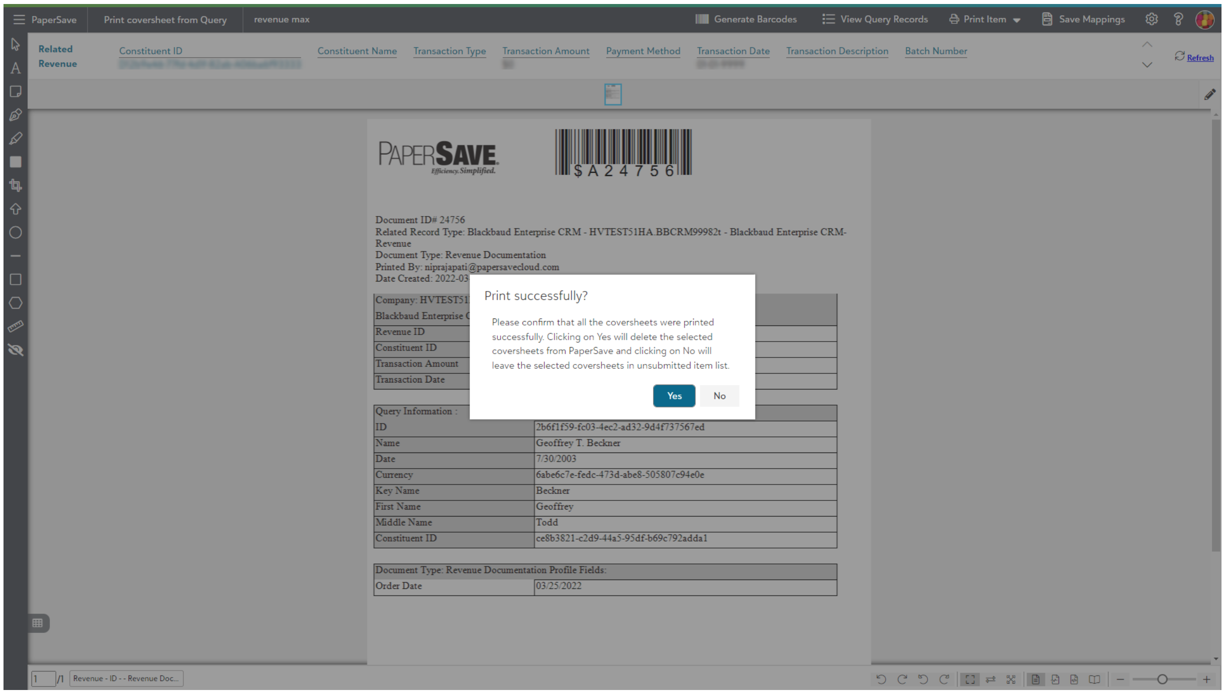
8) Now, click on **Print Item** and select any of the following Print options as per your requirement.

- **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.



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
PAPERSAVE Efficiency. Simplified.
$A24756
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
Company: HVTEST51
Blackbaud Enterprise
Revenue ID
Constituent ID
Transaction Amount
Transaction Date
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.
Yes
No
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-c2d9-44a5-95df-b69c792adda1
Document Type: Revenue Documentation Profile Fields:
Order Date
03/25/2022
Revenue - ID - - Revenue Doc...

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

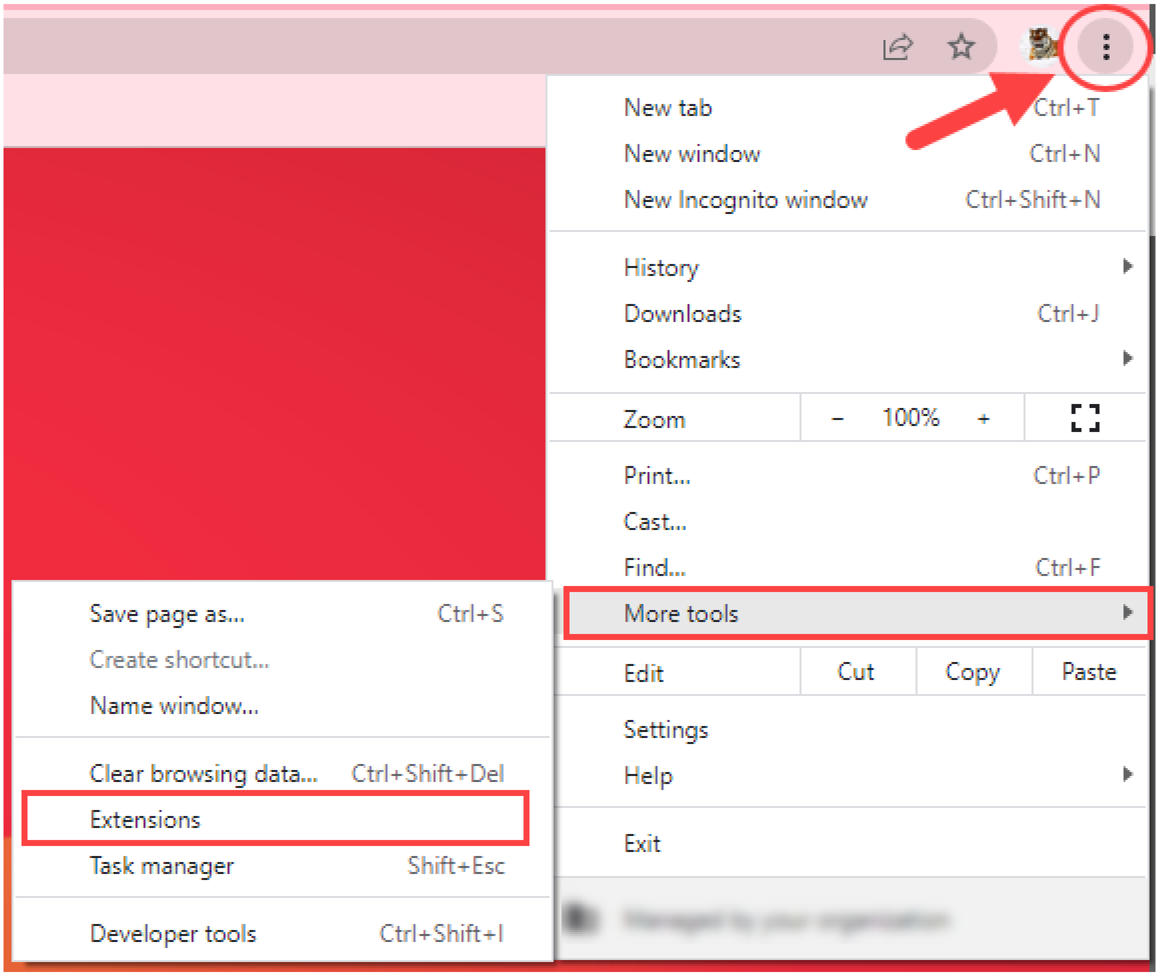
Follow the below steps to install PaperSave Batch Integration Plug-in:

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

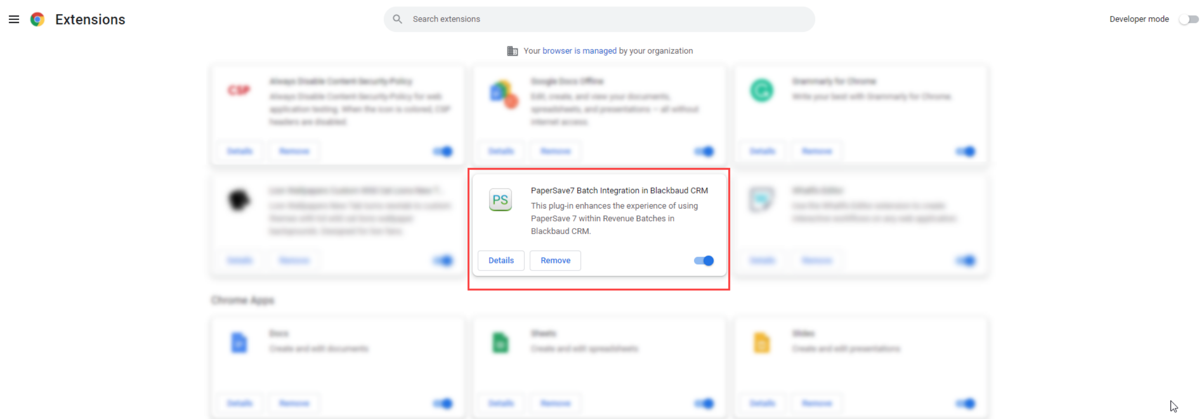
Sample URL: https://chrome.google.com/webstore/detail/papersave7-batch-integrat/ekaeipfbpbiebnlioffpapkflflmflfj

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

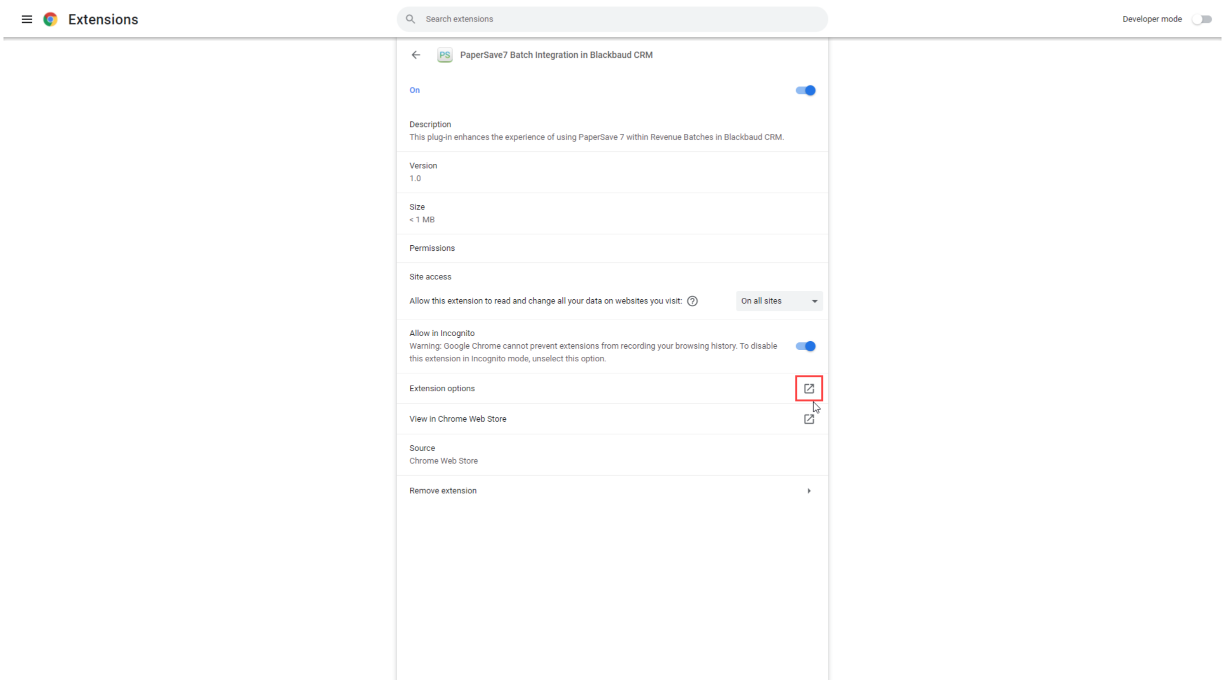
3) Once installed, Click on Ellipse icon > More Tools > Extensions.

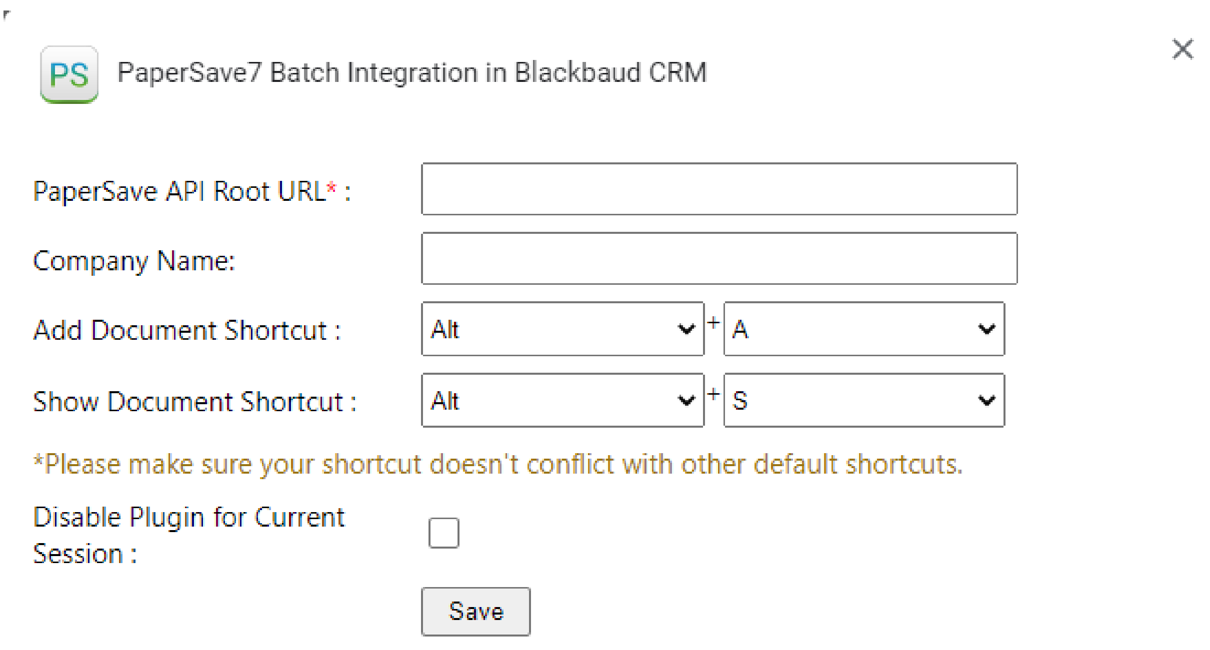


4) Now, enable PaperSave 7 Batch Integration Plug-in and click on **Details** button as shown below



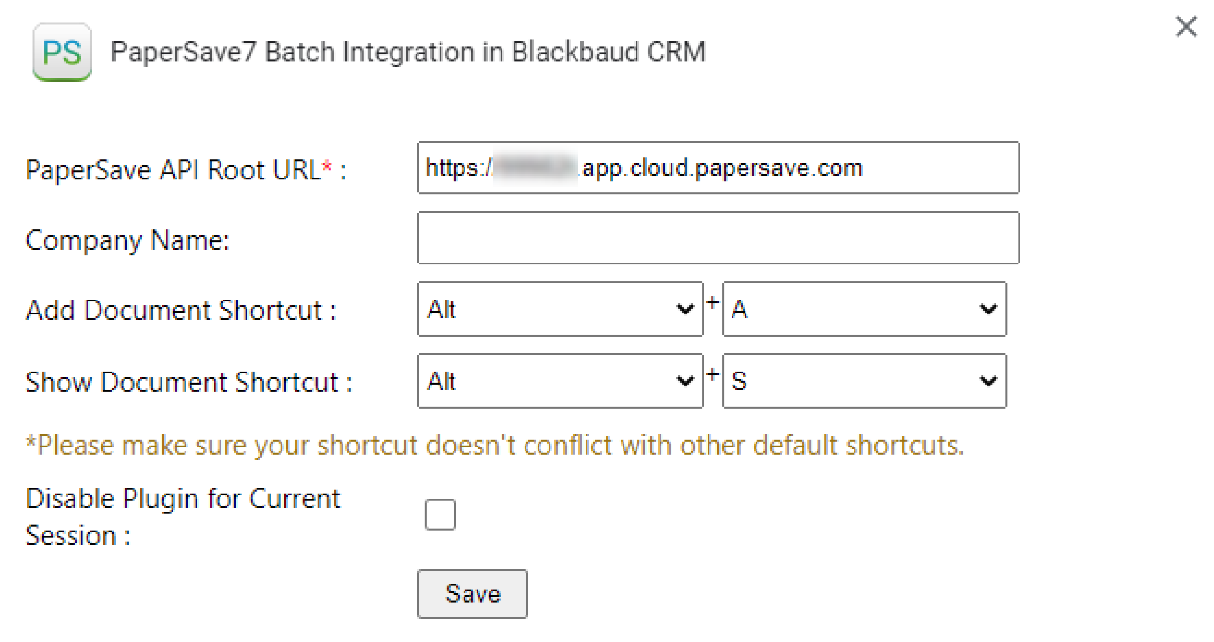
5) Click on **Extension options** as shown below and Batch integration dialog box appears where you can configure customizable shortcuts.



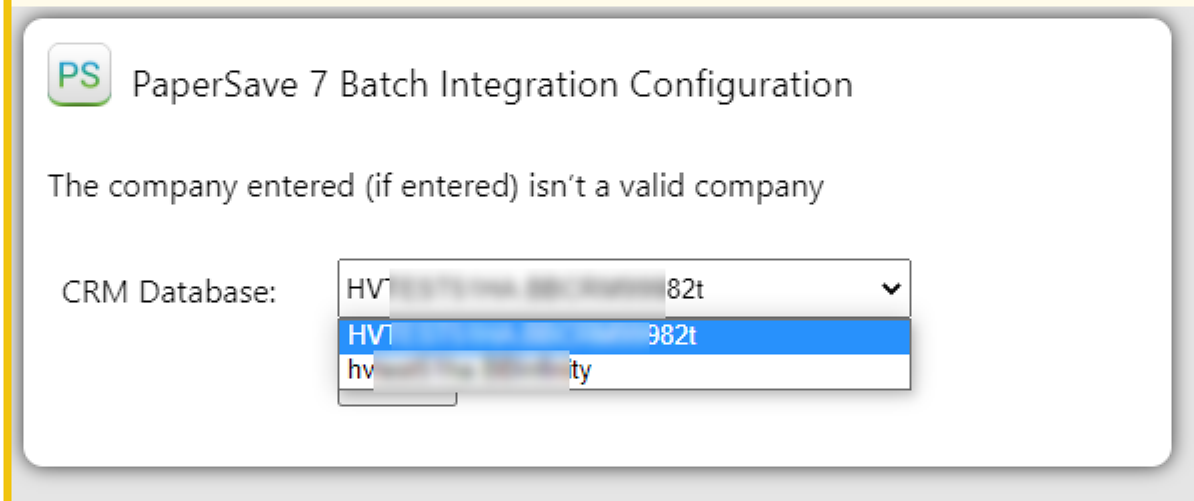


> **Note:** Please make sure your shortcut does not conflict with other default (browser or windows) short-cuts.

6) Enter **PaperSave API Root URL** (f**or 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.



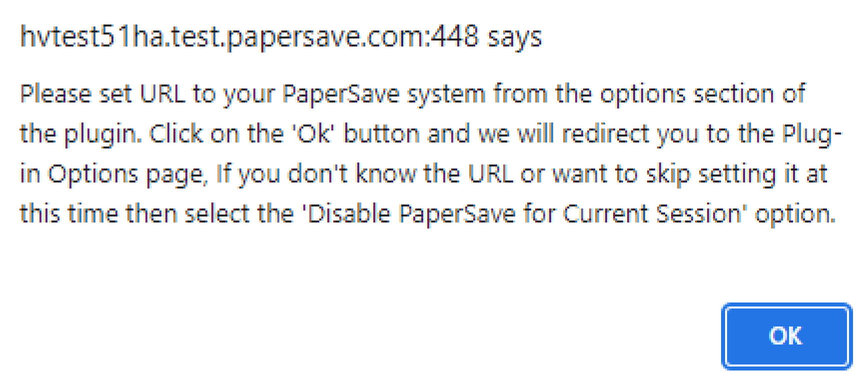
Tip: When you perform any PaperSave operation in Revenue batch and only one company is configured, then that single company name will automatically get mapped in the Company Name field of the batch integration dialog box. Now, in case you have multiple companies, a dialog box appears as shown below where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



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

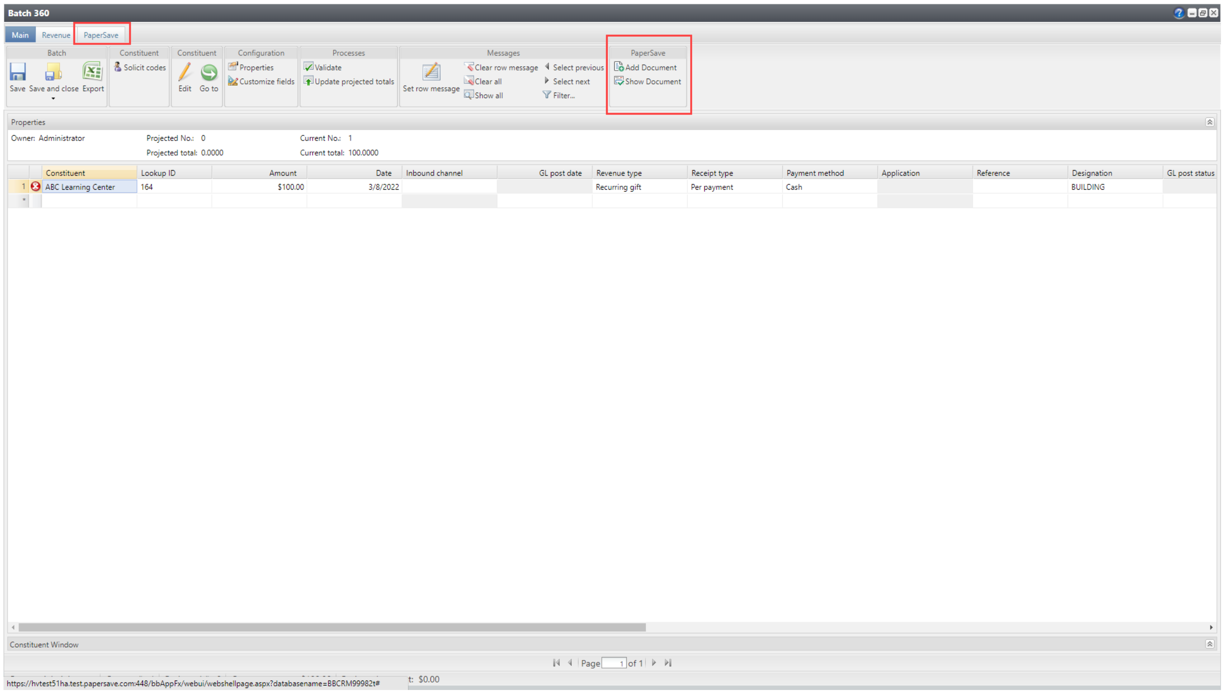
Example: If two companies are registered as **Company A** and **Company B** and if the plugin is installed for **Company A**, it will work with **Company A** only. If you have logged in with Company B, the plugin will not work.

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

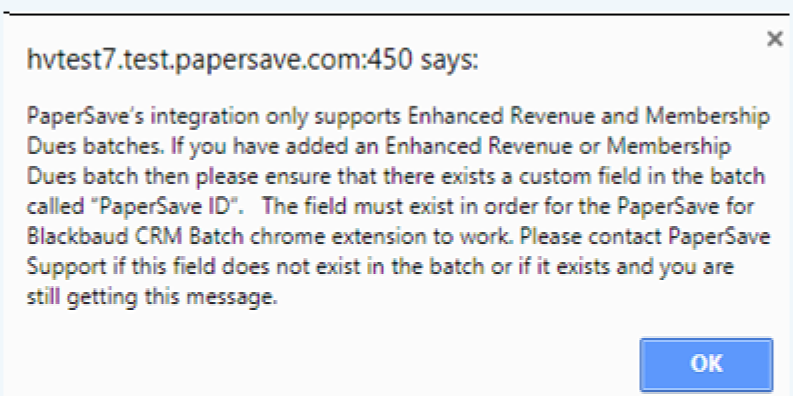


- If you click **OK** it redirects you to batch integration dialog box and if you don’t want to define or don't know the Root URL, then you can define disable PaperSave for session by using **Disable PaperSave for Current Session** option and it gets disabled for current session.

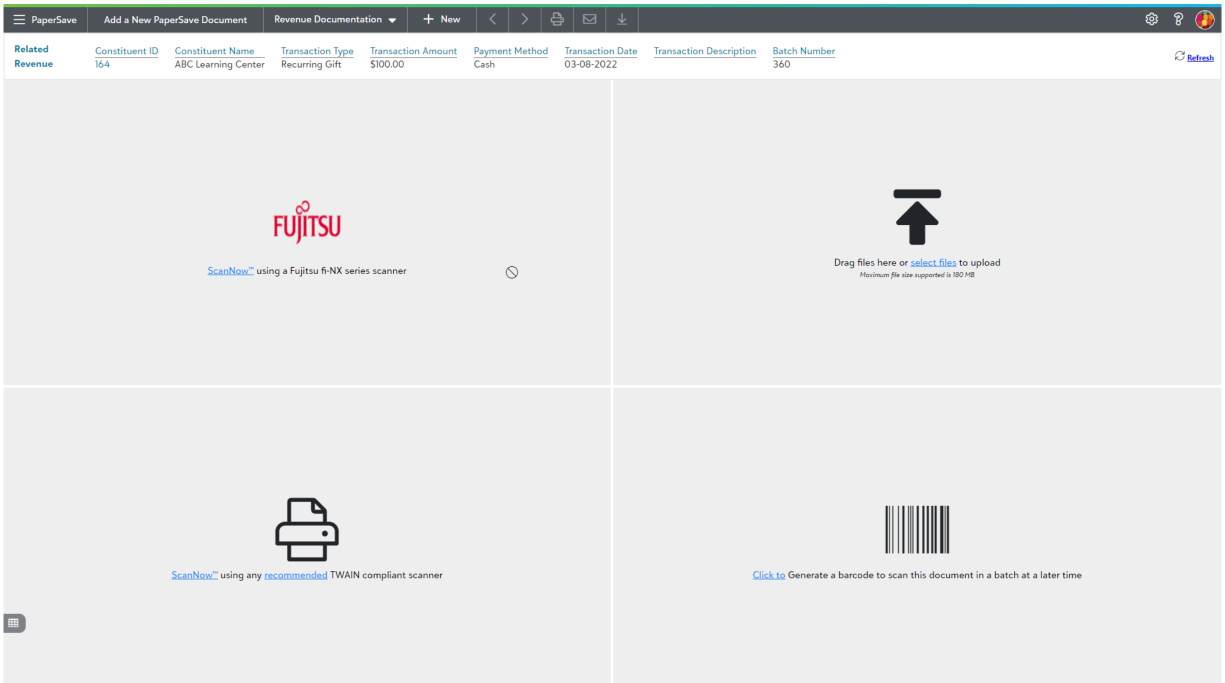
8) When PaperSave Batch Integration Plugin gets installed successfully, PaperSave options are displayed as the add-in buttons in Home tab of Revenue Batch and a separate **PaperSave** tab is also added to the batch as shown below.



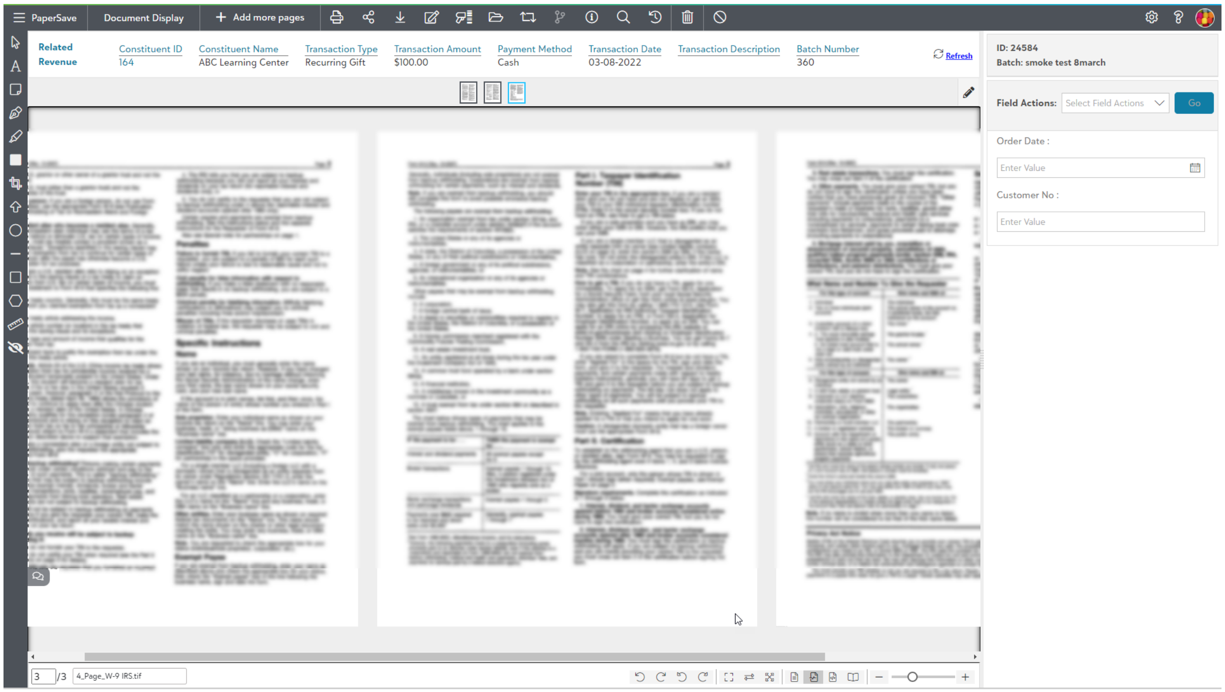
Note: While clicking on **Add Document** button, a prompt may appear as below showing that 'Paper-SaveID' field needs to be added to Batch Template. Click here to know more about it.



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:



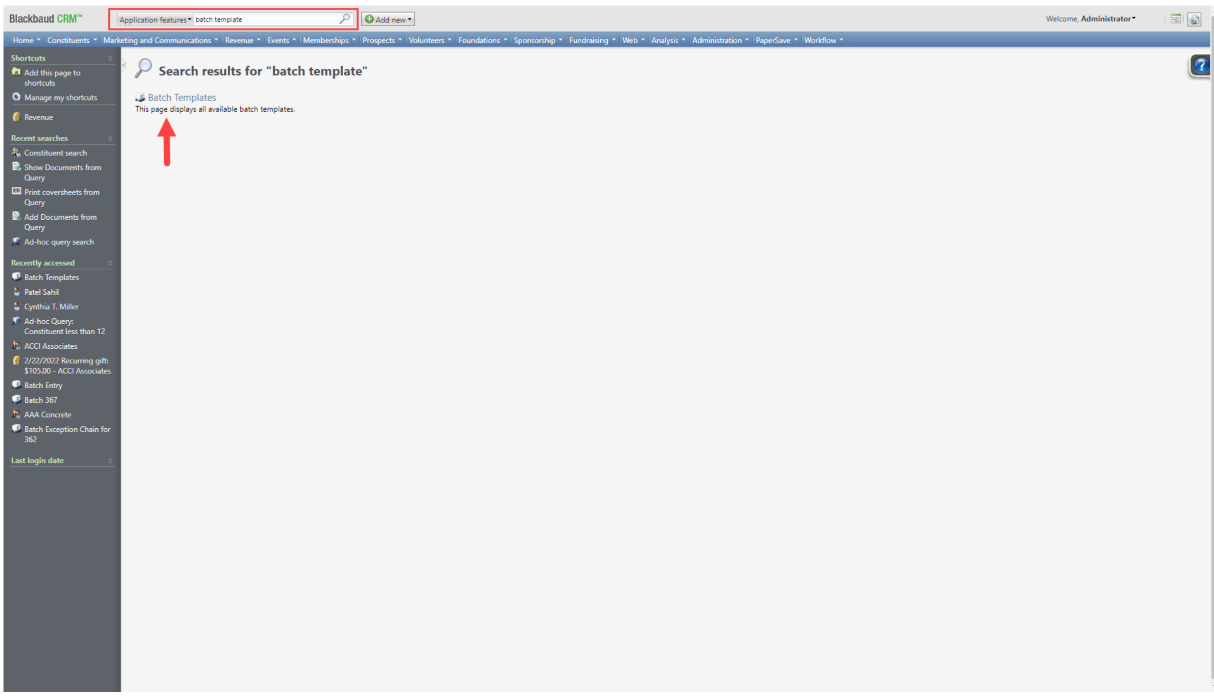
- And click on **Show Document** button or Press **Alt+S** or your customized shortcut to view the added documents and it will open PaperSave's **Document Display** window as shown below:


PaperSave
Document Display
Add more pages
Related Revenue
Constituent ID
164
Constituent Name
ABC Learning Center
Transaction Type
Recurring Gift
Transaction Amount
$100.00
Payment Method
Cash
Transaction Date
03-08-2022
Transaction Description
Batch Number
360
Refresh
ID: 24584
Batch: smoke test 8march
Field Actions:
Select Field Actions
Go
Order Date :
Enter Value
Customer No :
Enter Value
3
/3
4_Page_W-9 IRS.tif

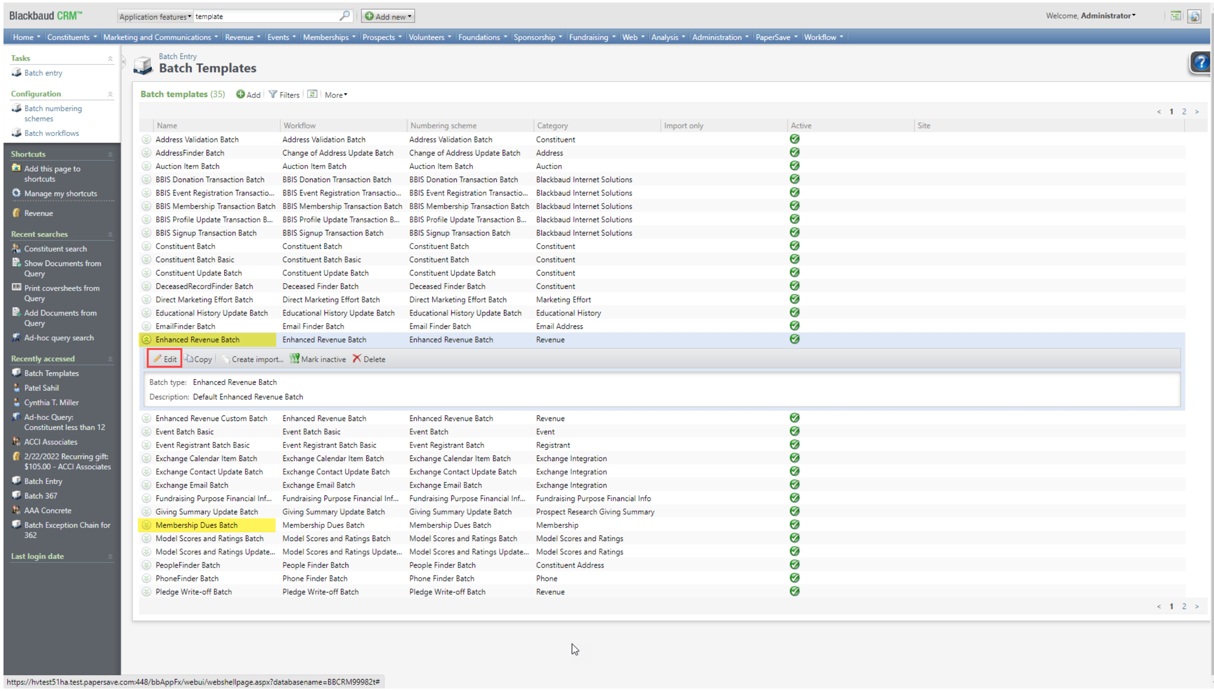
Steps to add PaperSaveID to batch template

Follow the below steps to add PaperSaveID to batch template:

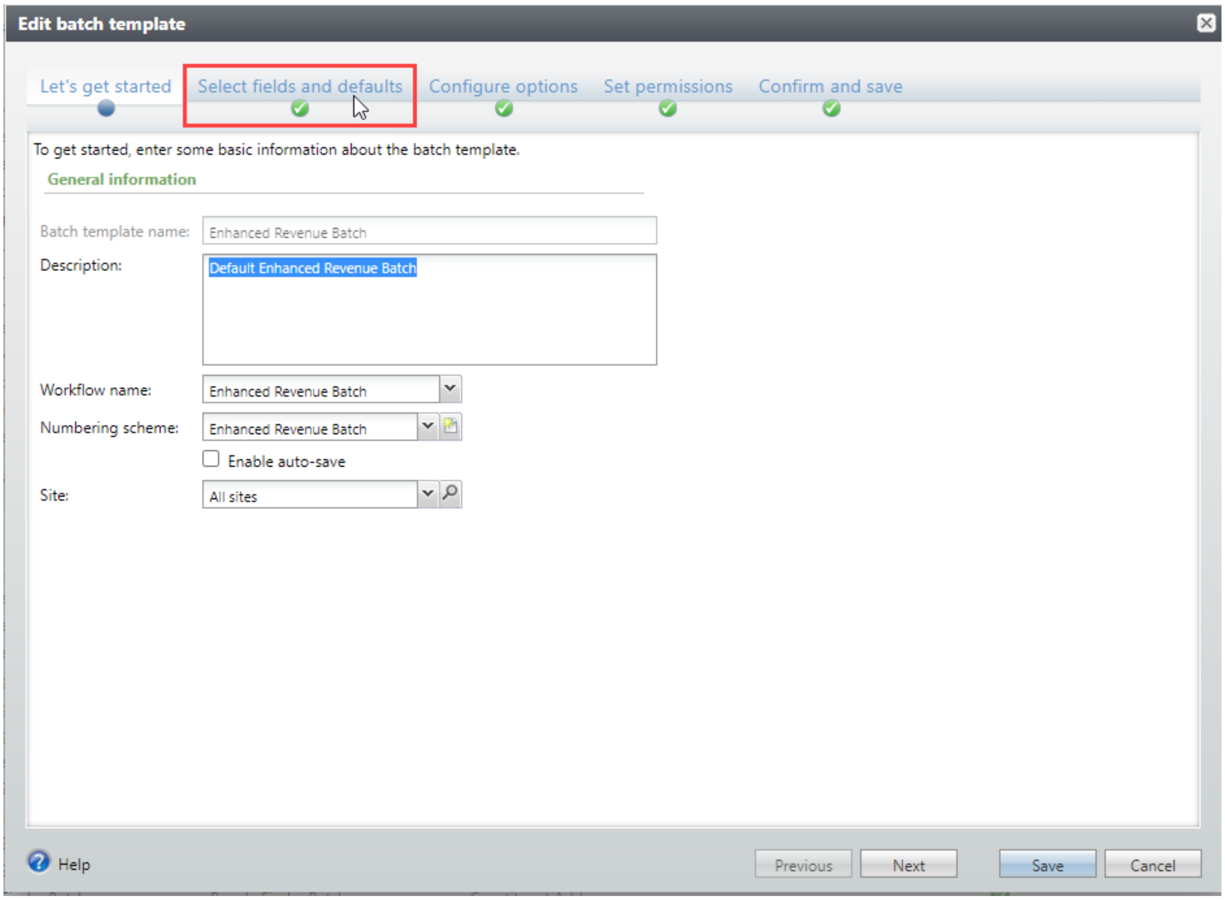
1) Open Blackbaud CRM application and search for keyword "Batch Template" in the search box as shown below and select **Batch Templates** option.



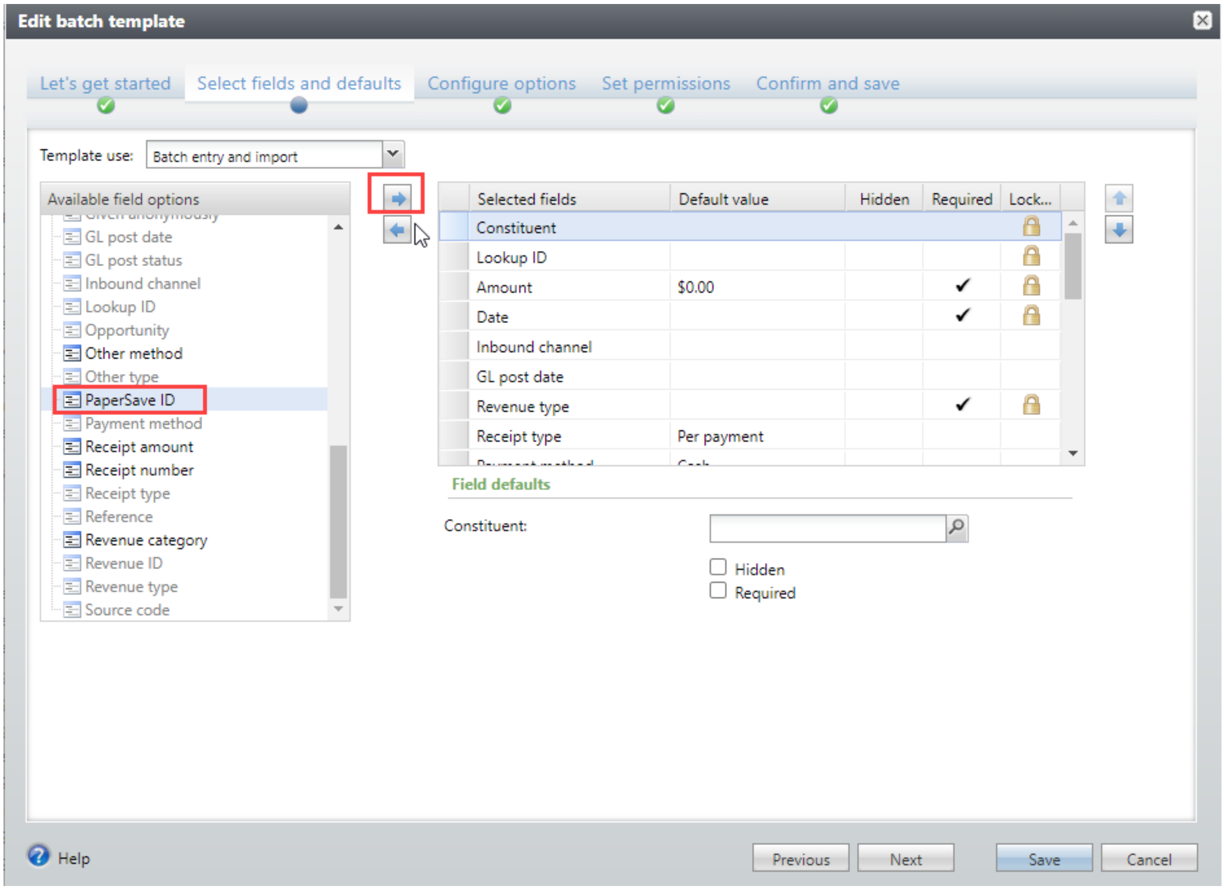
2) Now, Search for batch templates for **Enhanced Revenue Batch** and **Membership Dues Batch**. Now, select one of the template and click on **Edit** button. Let's say Enhanced Revenue Batch as shown below.



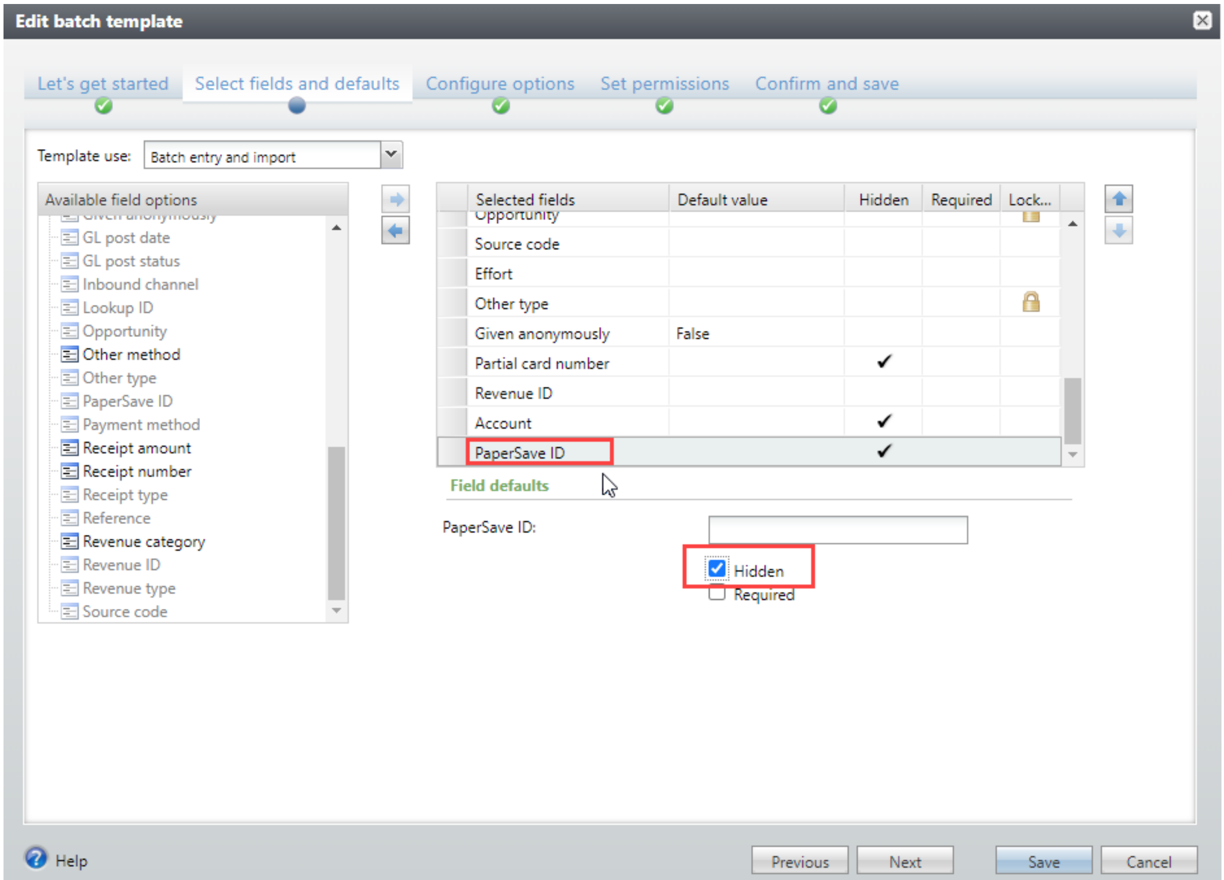
3) Navigate to **Select fields and defaults** as shown in below screen.



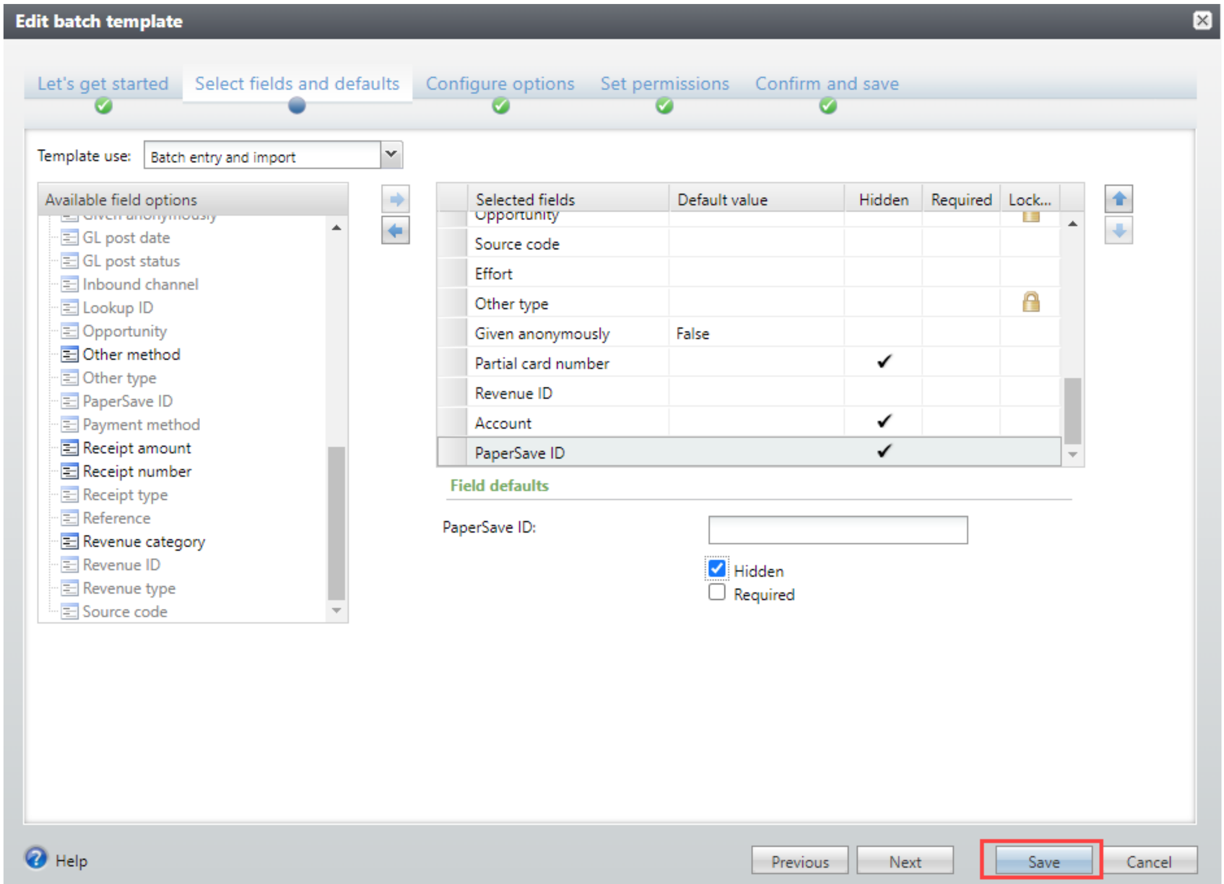
4) Locate **PaperSave ID** field in Available field options and add that field to batch template.



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.



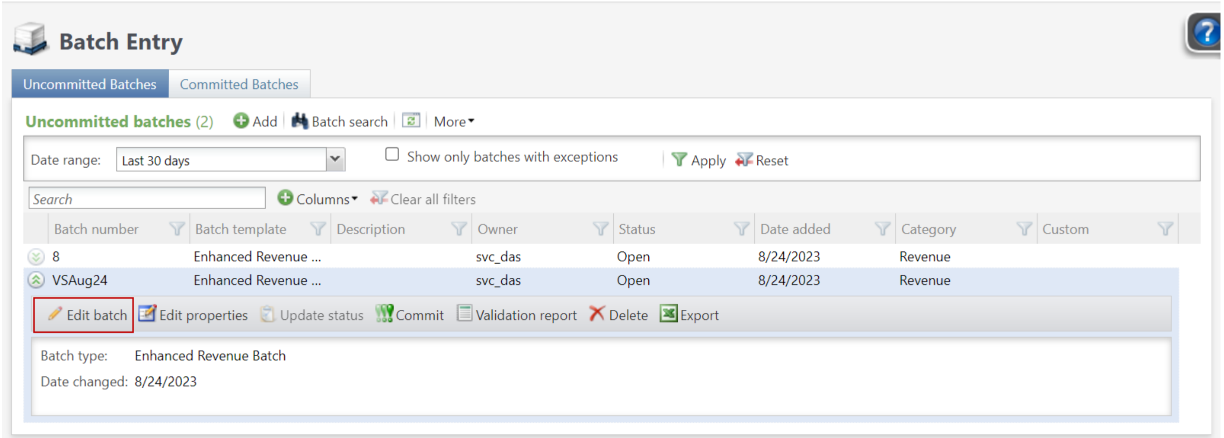
> **Note:** Repeat from steps **2** to **6** for all the batch templates of Enhanced revenue and Membership dues batches used by PaperSave users.

Add/Show Documents from Revenue batch

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

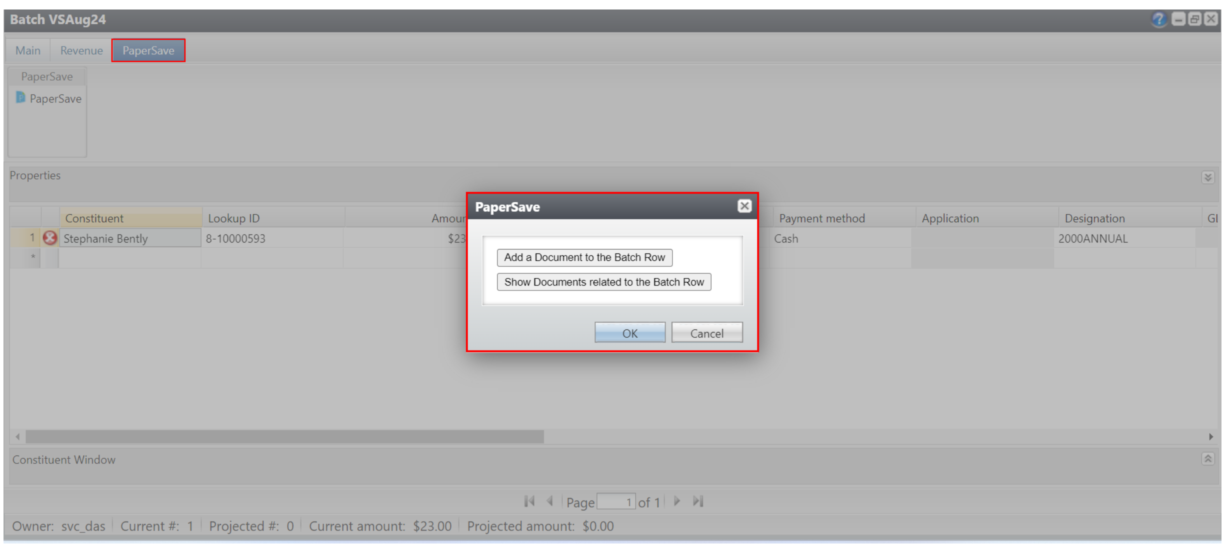
To access PaperSave options within Revenue Batch:

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.

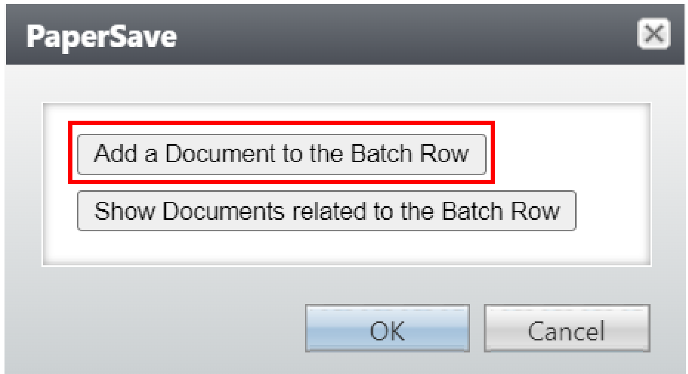
3) On the Batch screen, click on the PaperSave tab and then PaperSave menu. A dialog box appears from where you can perform the operations such as "Add document to the Batch row" and "Show documents related to the Batch row. You can either click on any of the options or press the shortcut keys to perform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



Adding Document to the Batch Row

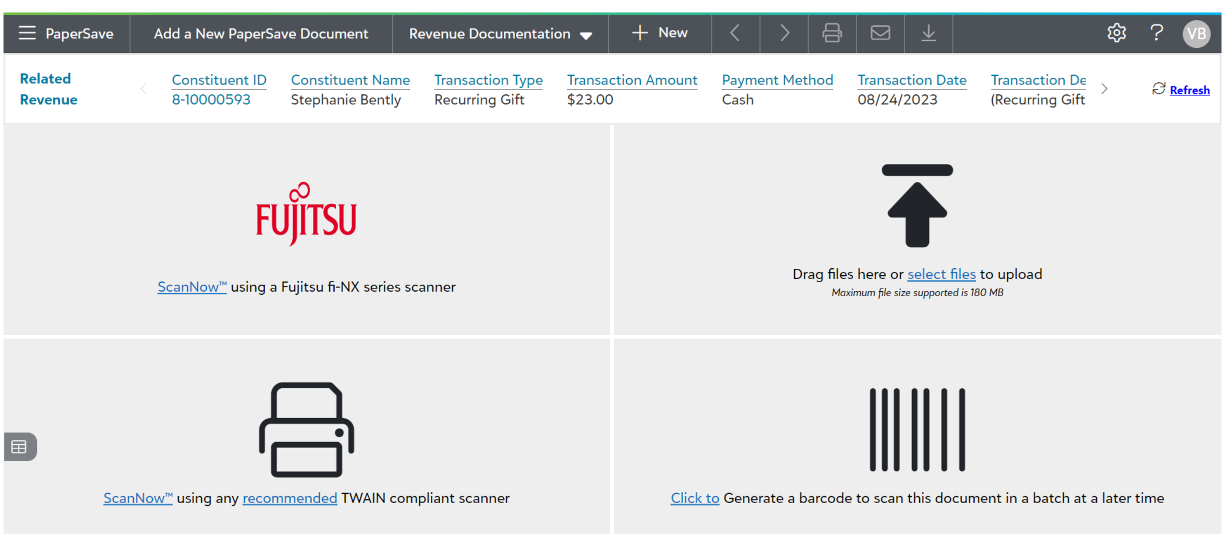
To add a document related to the batch row:

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

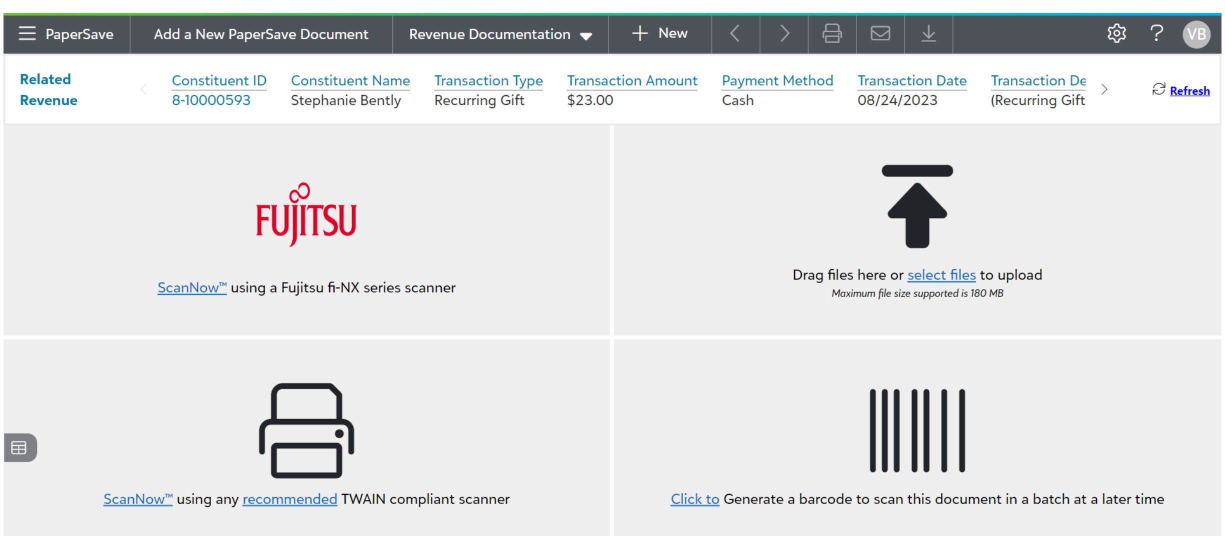
PaperSave provides various options for acquiring the documents. You can select any of the following file capture options to add documents to your record in PaperSave:

• ScanNow using TWAIN compliant scanner

• ScanNow using Fujitsu fi-NX series scanner

• Drag files or Select the files to upload

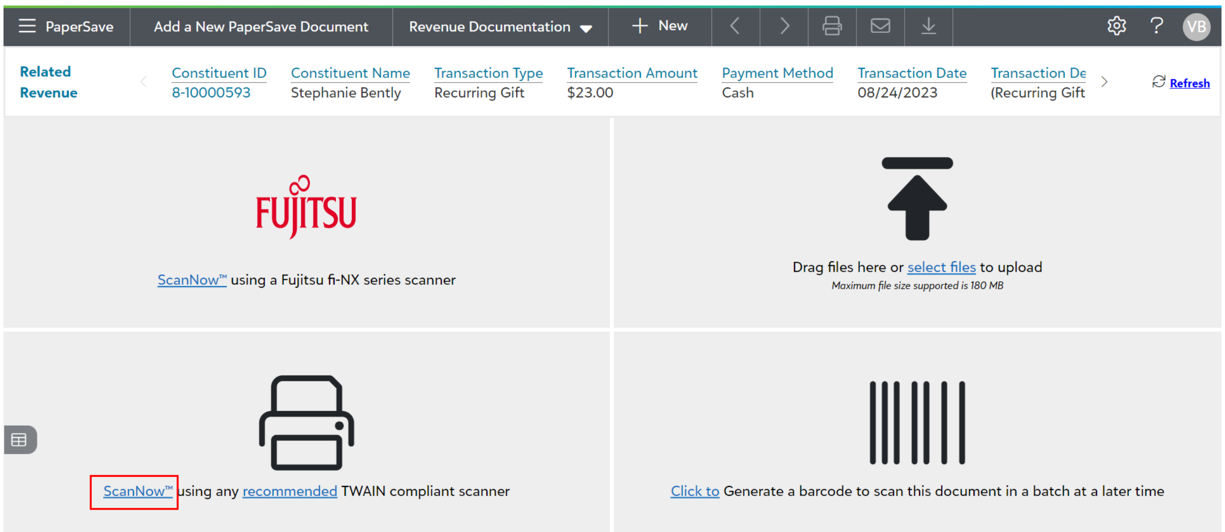
• Click to generate a barcode to scan the document in a batch at a later time



ScanNow using TWAIN scanner

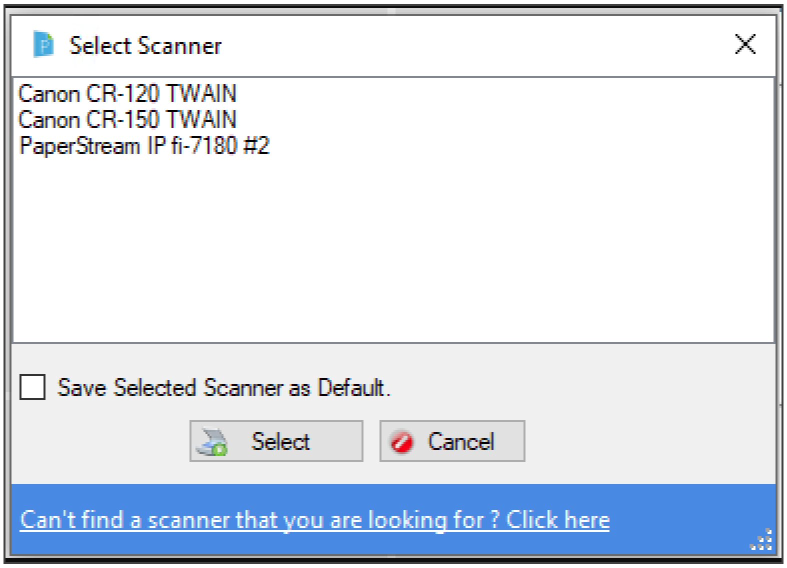
Watch the video to learn how to add documents for an Integrated app record using a TWAIN scanner.

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

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
Duplex	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

16 GB RAM			
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

8 GB RAM

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

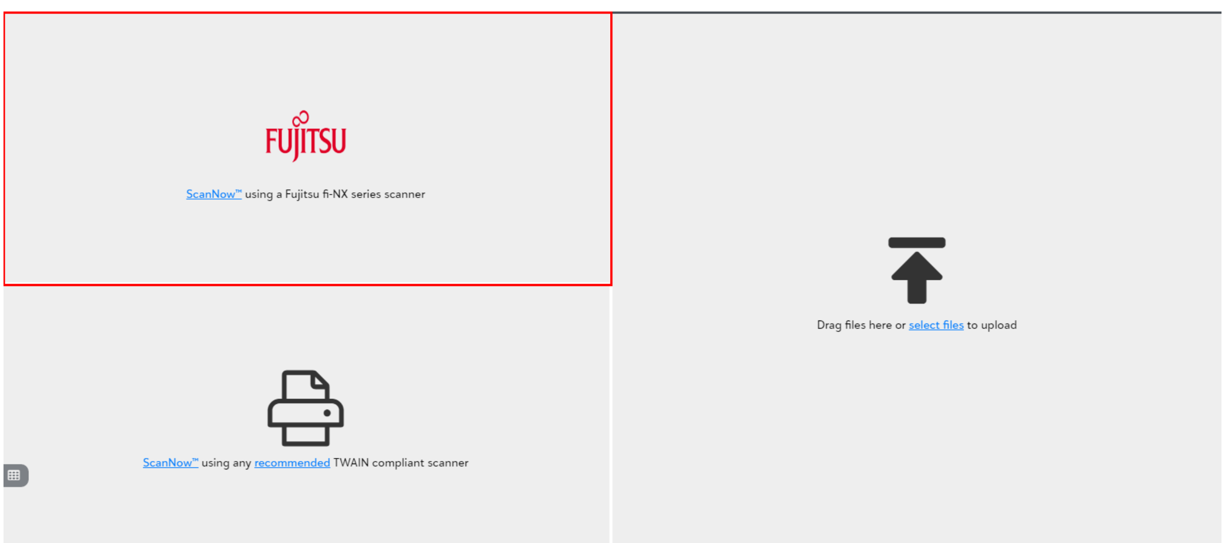
> **Note:** Once you acquire the item, you can validate and submit the unsubmitted document to the Work-flow. Click here to learn in detail about validating and submitting the documents.

Scan using Fujitsu fi-NX series scanner

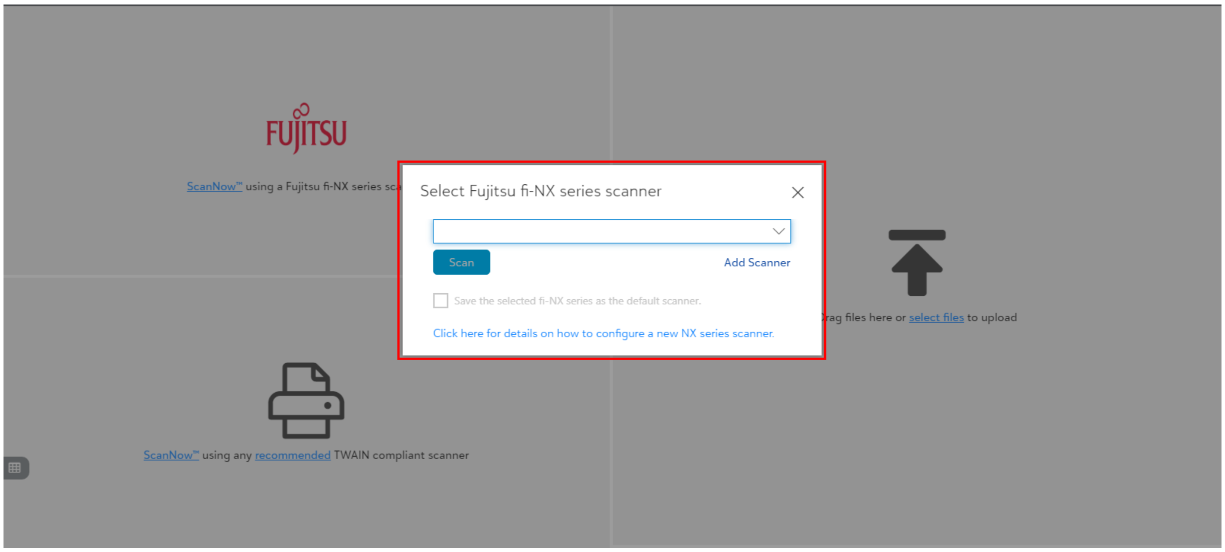
1) Watch the video to learn how to add documents for an integrated app record using a Fujitsu fi-NX series scanner.

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.

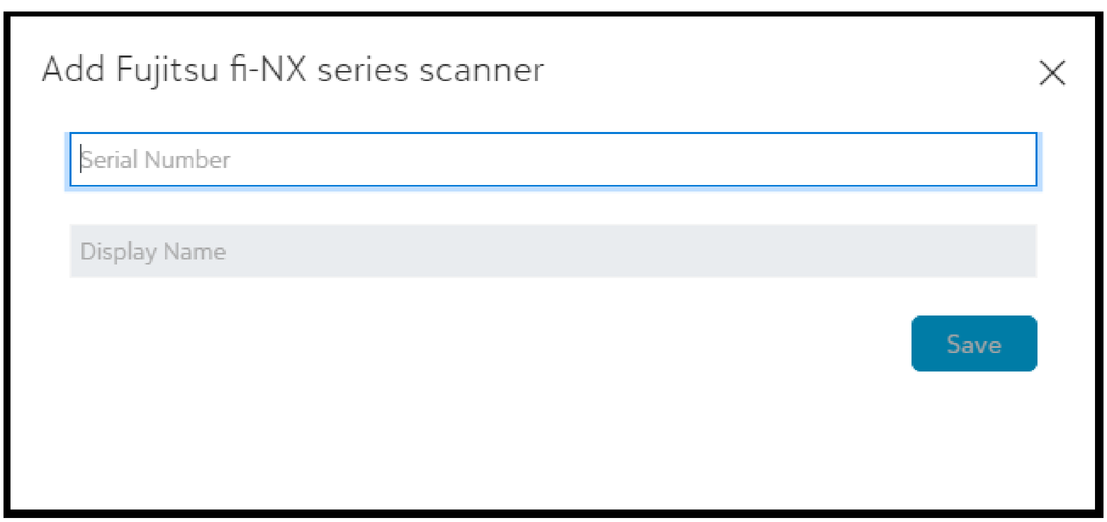
3) You will be prompted to pick a scanner from the available list of scanners upon clicking "ScanNow™ using Fujitsu fi-NX scanner". Select a scanner from the available list of scanners to proceed with scanning the document as shown below:



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.

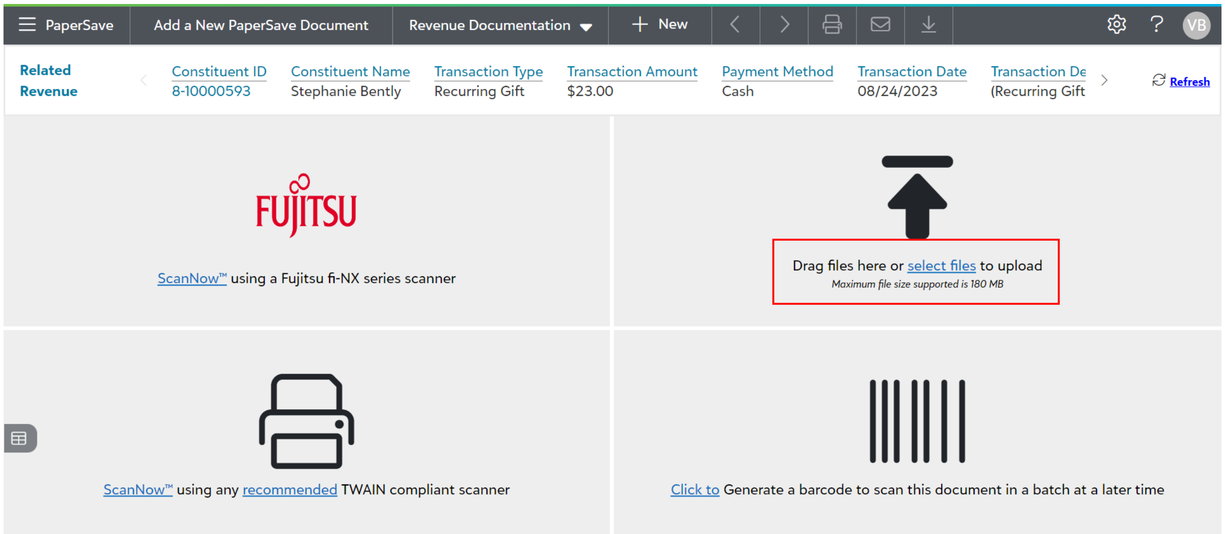
Drag files or select files to upload

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.



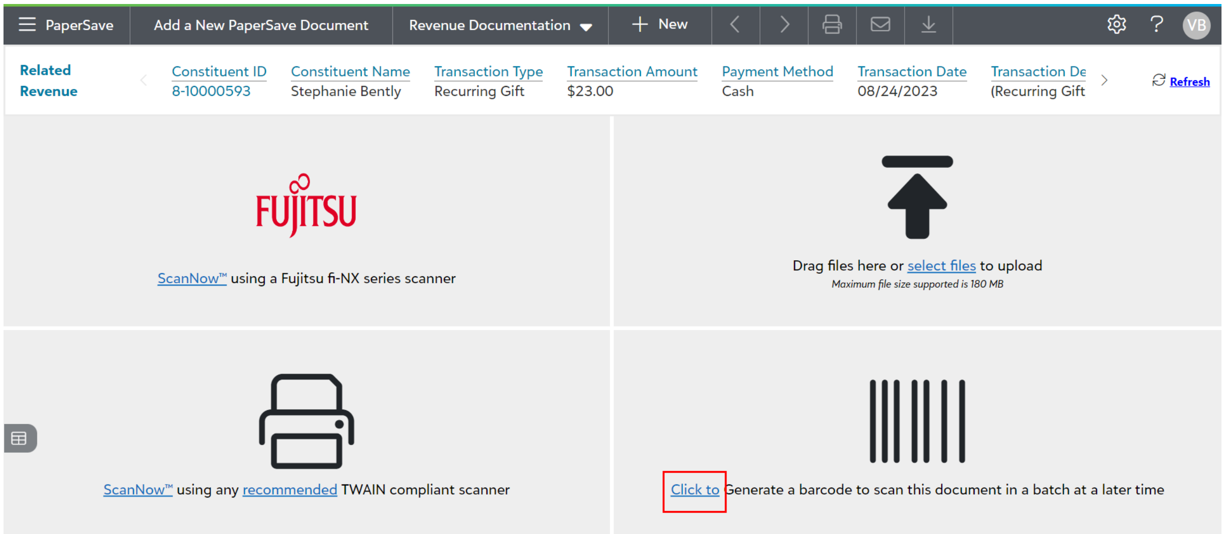
> **Note: Note**: Once you acquire the document, you can validate and save the document in the integrated app record. Learn in detail about validating and saving the documents.

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:

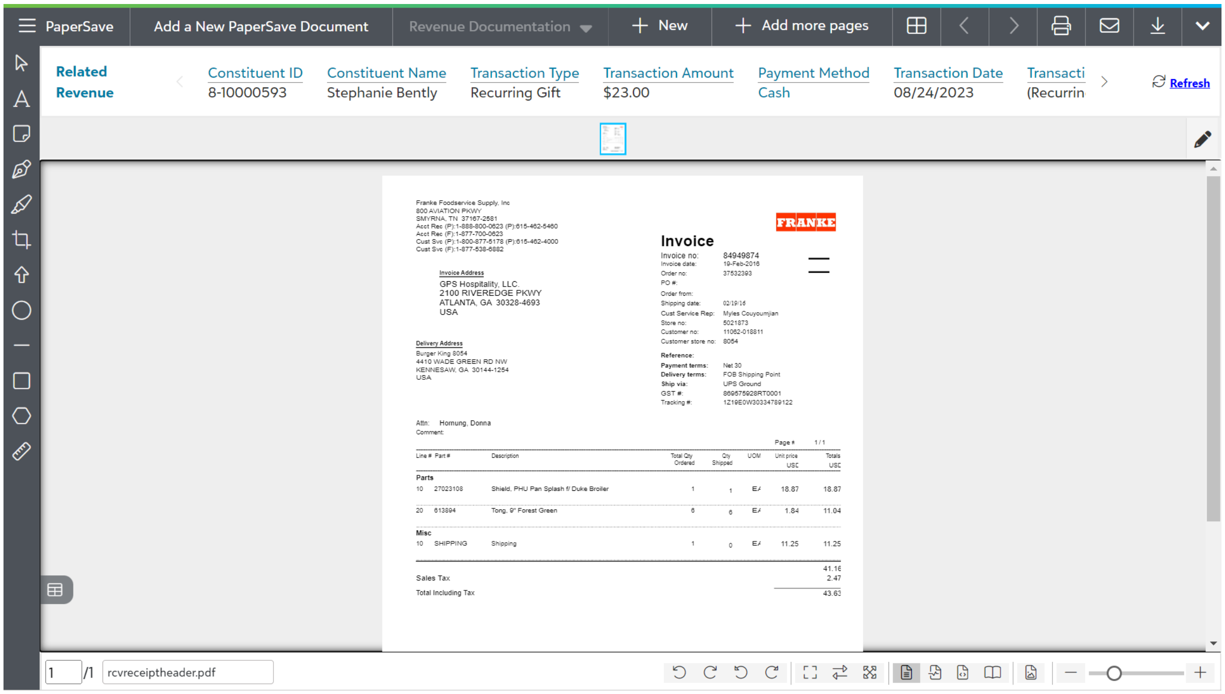


The document created with a barcode will be available in the unsubmitted documents. You can use the document with the generated barcode as the separator to scan the documents in a batch at a later time.

> **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

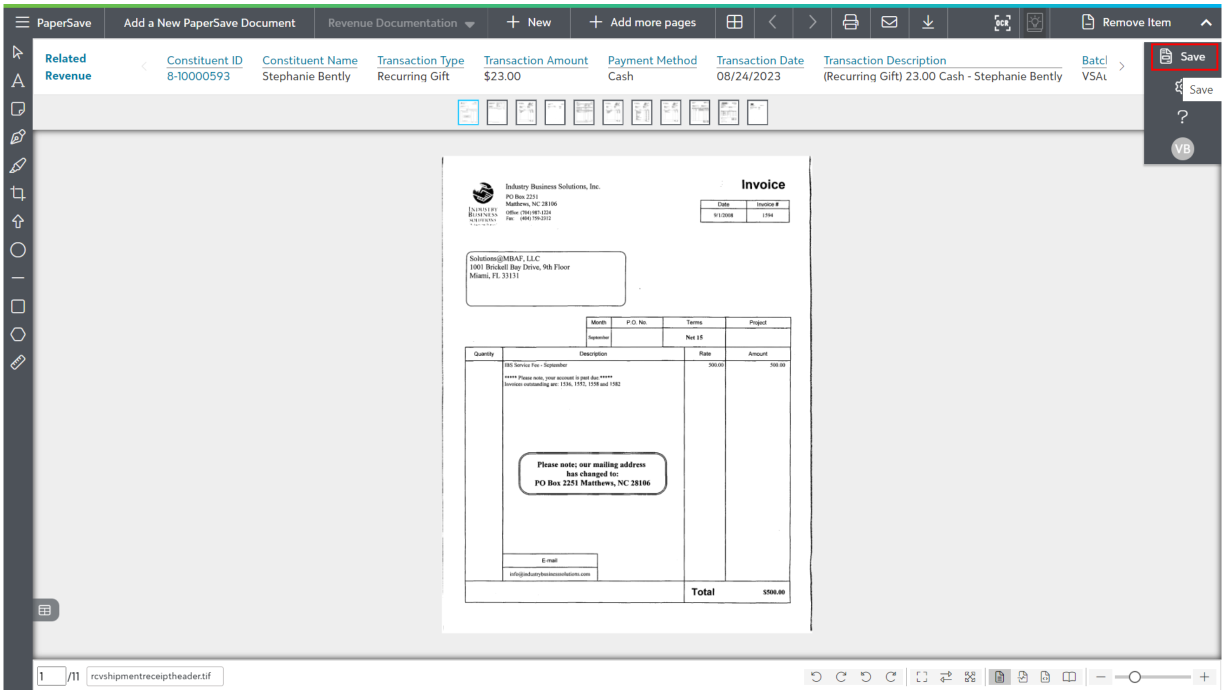
Once you validate the profile fields, you can save the acquired document to add it to Blackbaud CRM record.

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

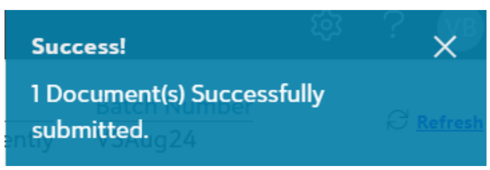
To save the document:

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.

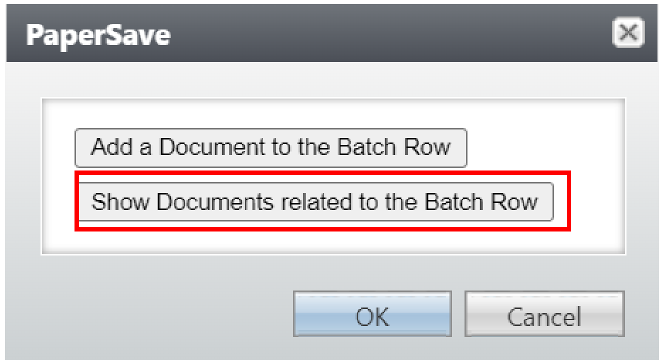


4) You can view the newly added document from the PaperSave options in the Blackbaud CRM record.

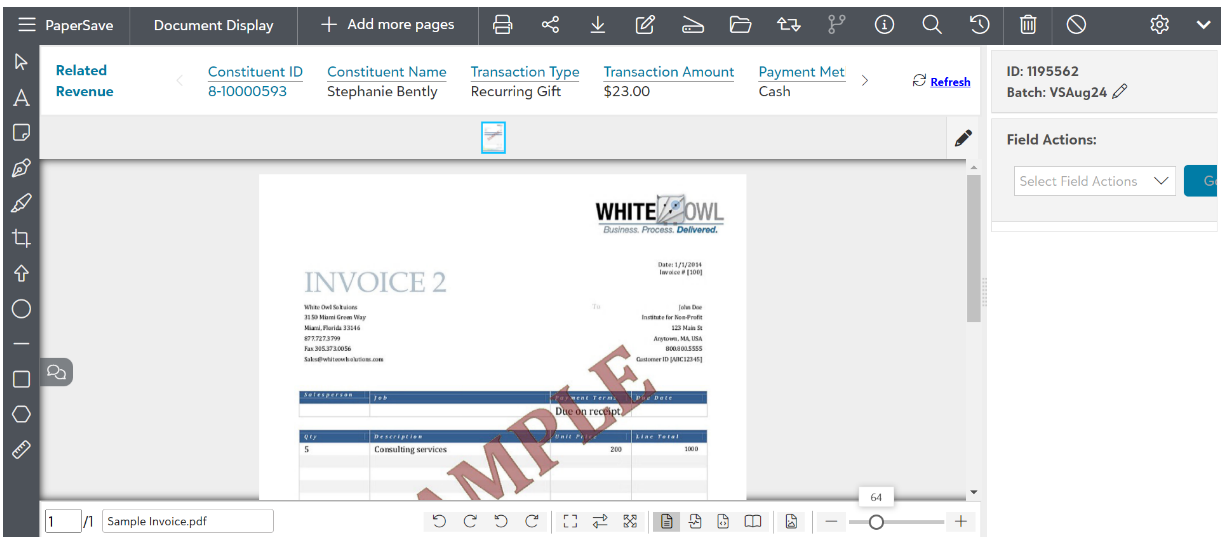
Showing Documents related to the Batch Row

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.

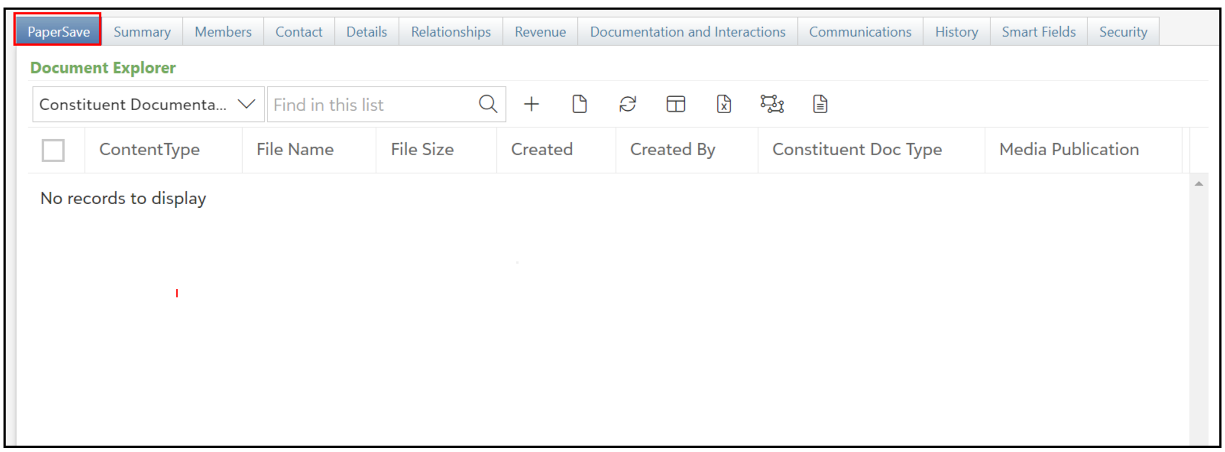


Accessing PaperSave options within Blackbaud CRM

After configuring and enabling PaperSave batch integration plug in as per the steps give in this section, PaperSave 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]

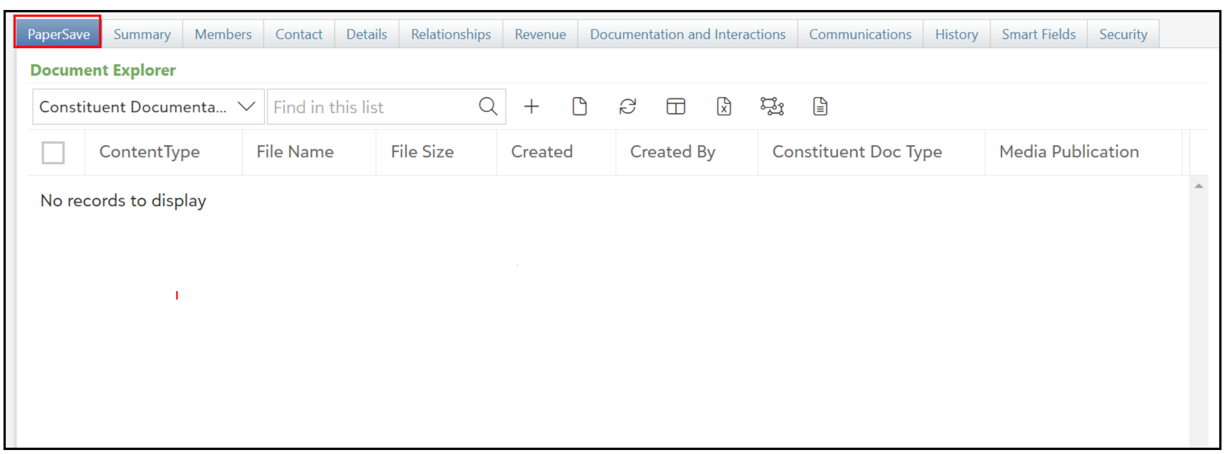
Add a new document to Blackbaud CRM

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.

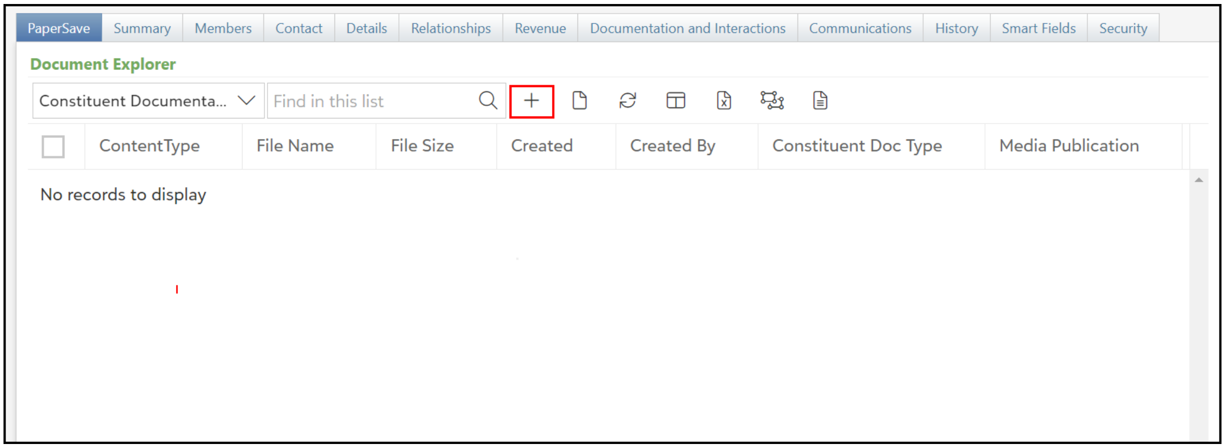
> **Tip:** Tip: Open Blackbaud CRMRecord to view or access PaperSave options, refer to Accessing PaperSave Options in Blackbaud CRM.

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.



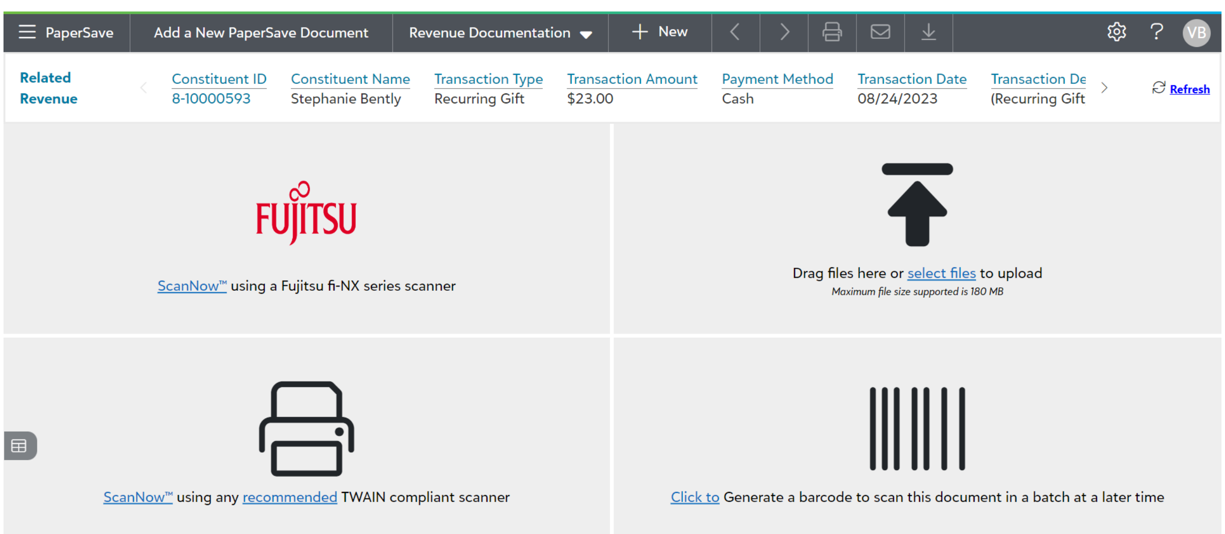
3) This will redirect you to the PaperSave application (as configured in Platform Services of Blackbaud CRM) from where you can add a new document using any of the following four options:

• ScanNow using a Fujitsu fi-NX series scanner.

• Drag or select files to upload.

• ScanNow using TWAIN complaint 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:

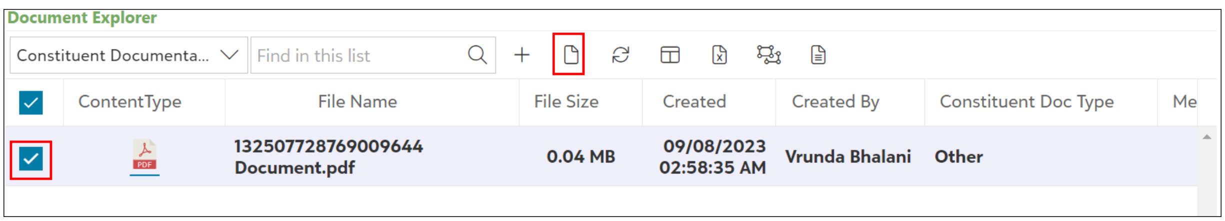
• Workflow Area

• Browse Area

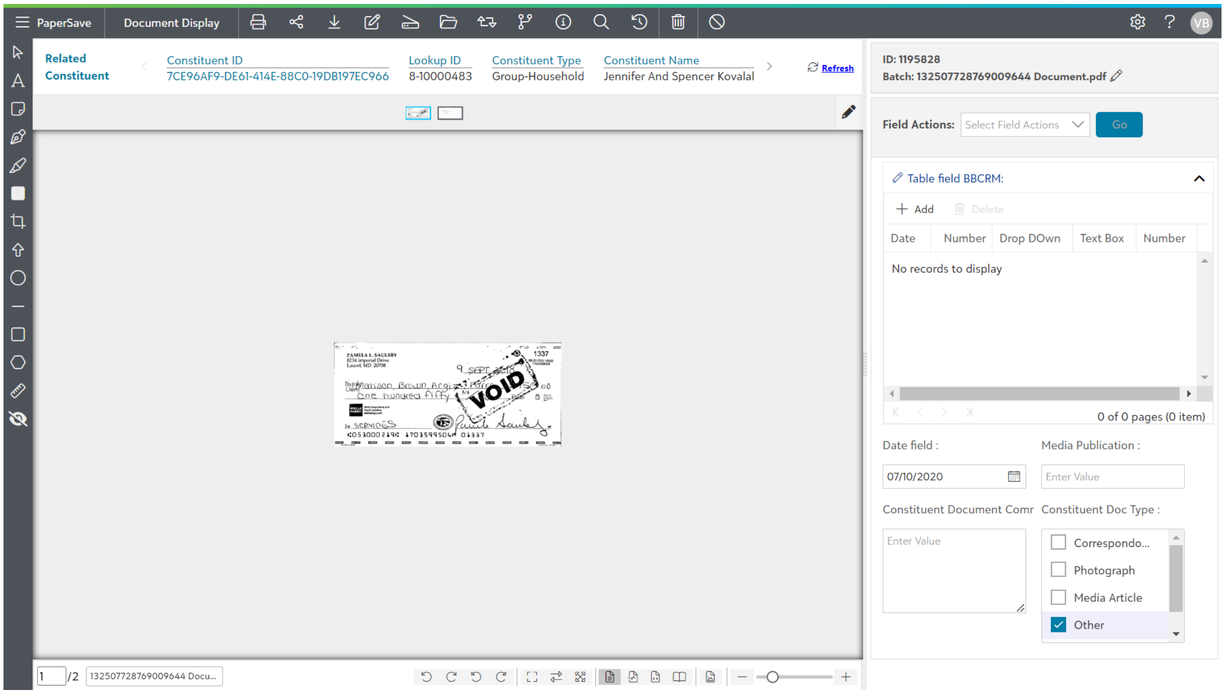
Open document from PaperSave options

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**.



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

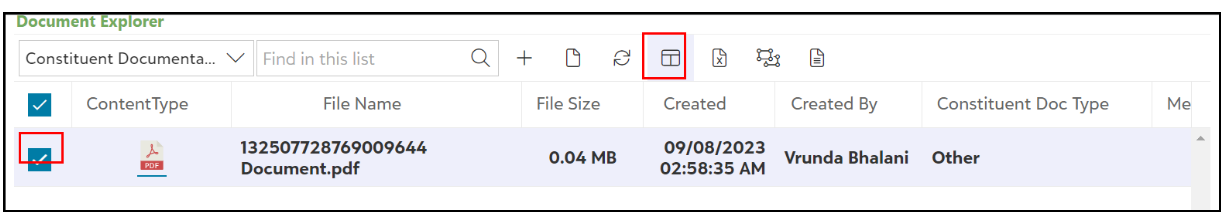


Choose Fields from PaperSave options

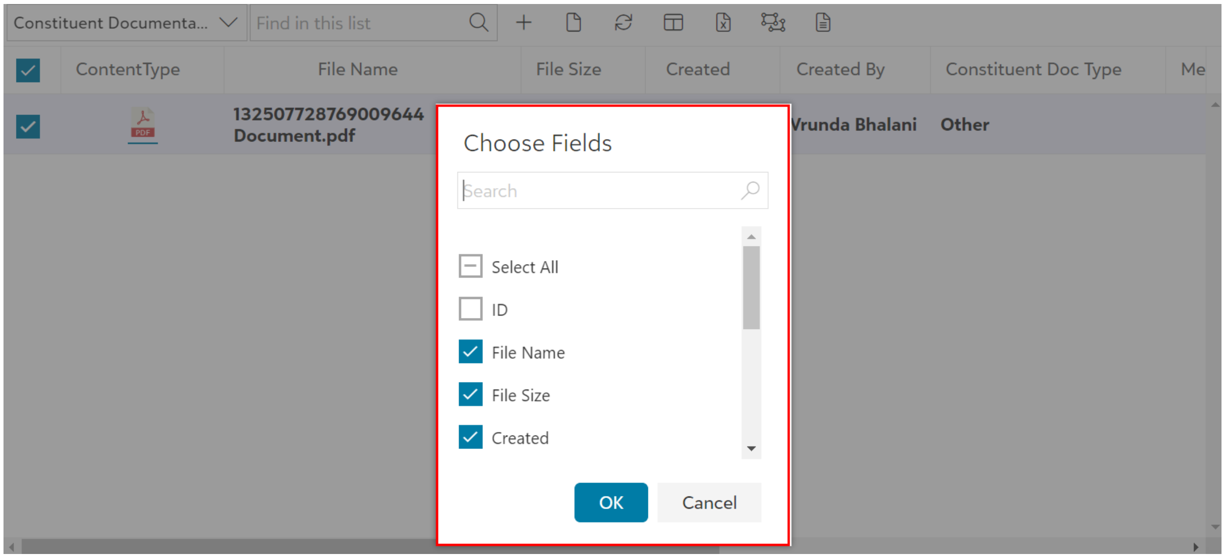
You can set your user preferences to manage what information is displayed in the list by adding or removing columns based on what's important to you using Choose Fields.

To choose fields, follow the steps below:

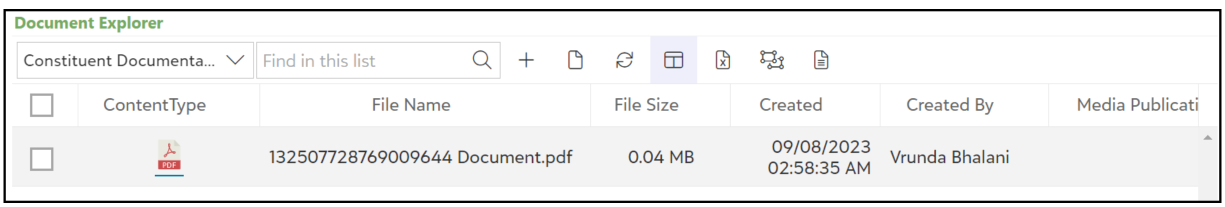
1) Click on "CHOOSE FIELDS" option in the list toolbar as shown in the below screen.



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"

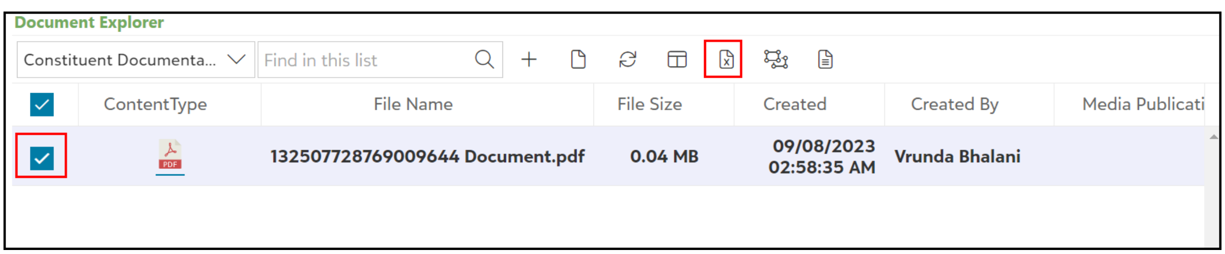
7) Click **Close** to exit the choose fields window without saving any changes.

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.



> **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.

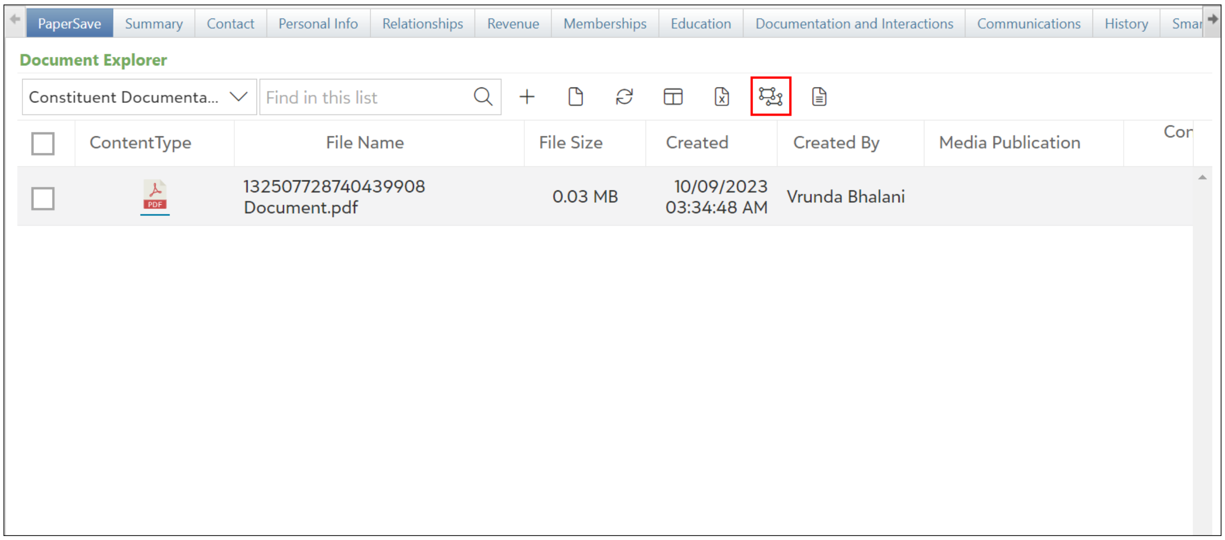
Here, the interrelationship guides the inner-relationships of the integrated application's record types along with records from the PaperSave database. It allows you to create a dynamic interrelationship between two integrated applications record types or within the same integrated application record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

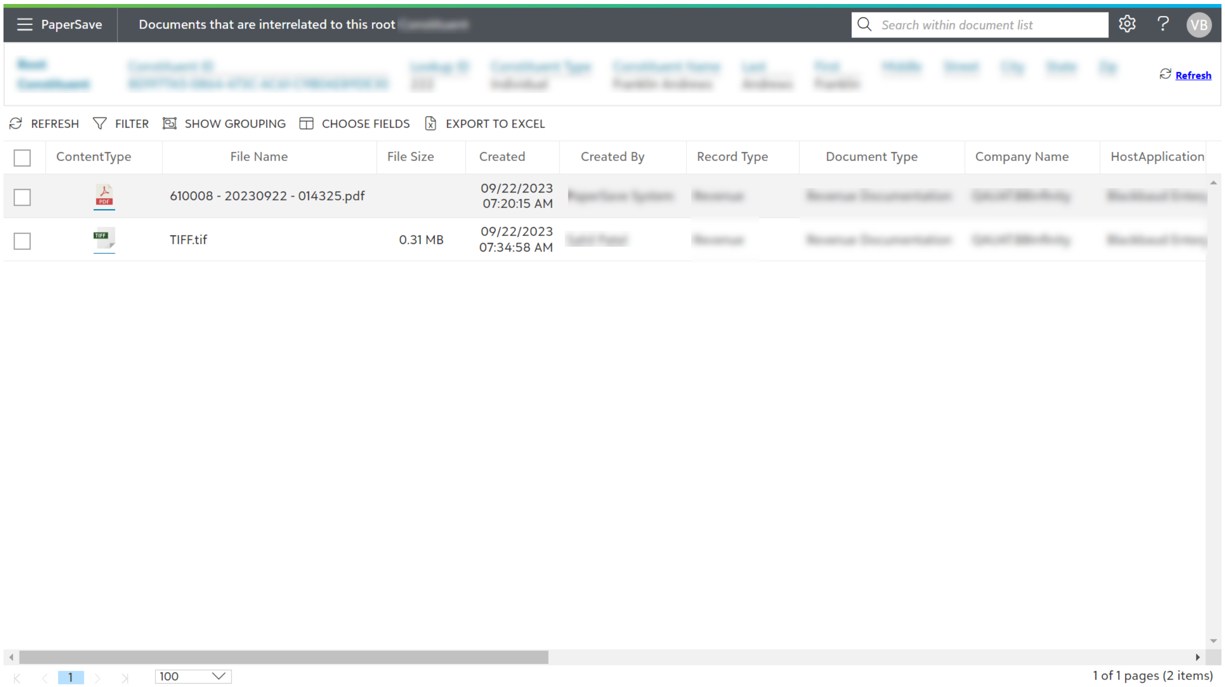
• **Refresh**: This option updates the recent changes in the show document list.

• **Filter**: This option allows you to narrow down the documents in the list by applying filter conditions. Learn more about Filter.

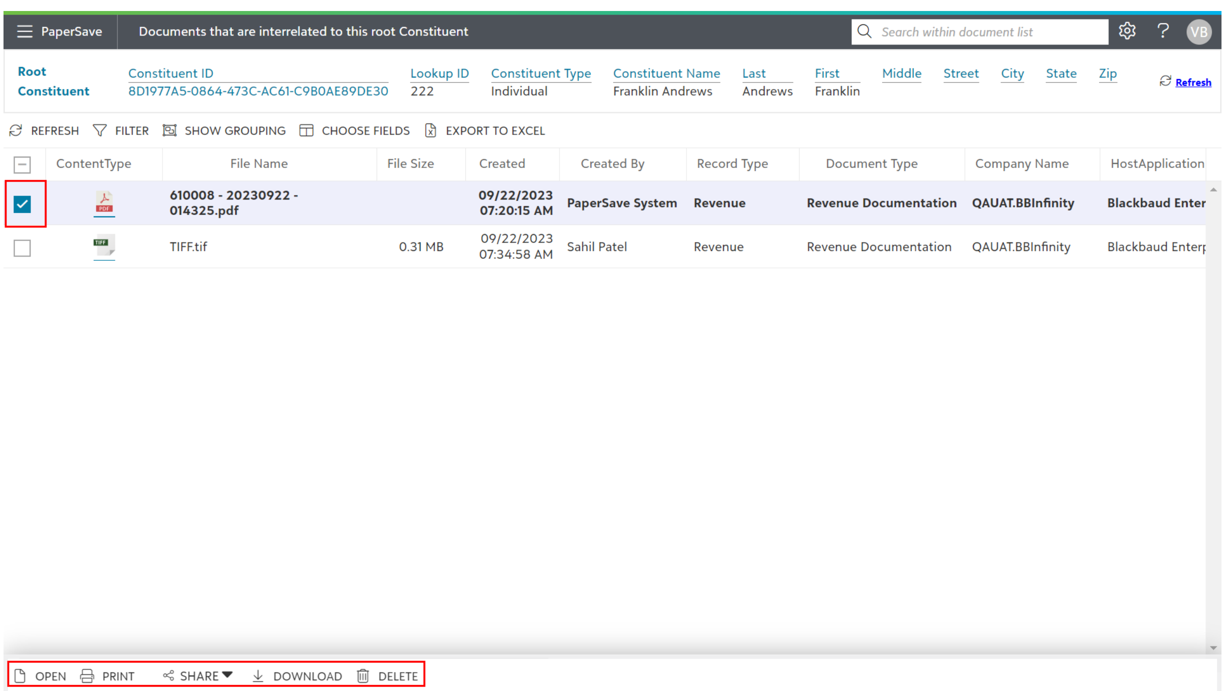
• **Show Grouping**: This option helps you to cluster the documents in the list based on the desired header fields. Learn more about Show Grouping.

• **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.



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.



• 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.

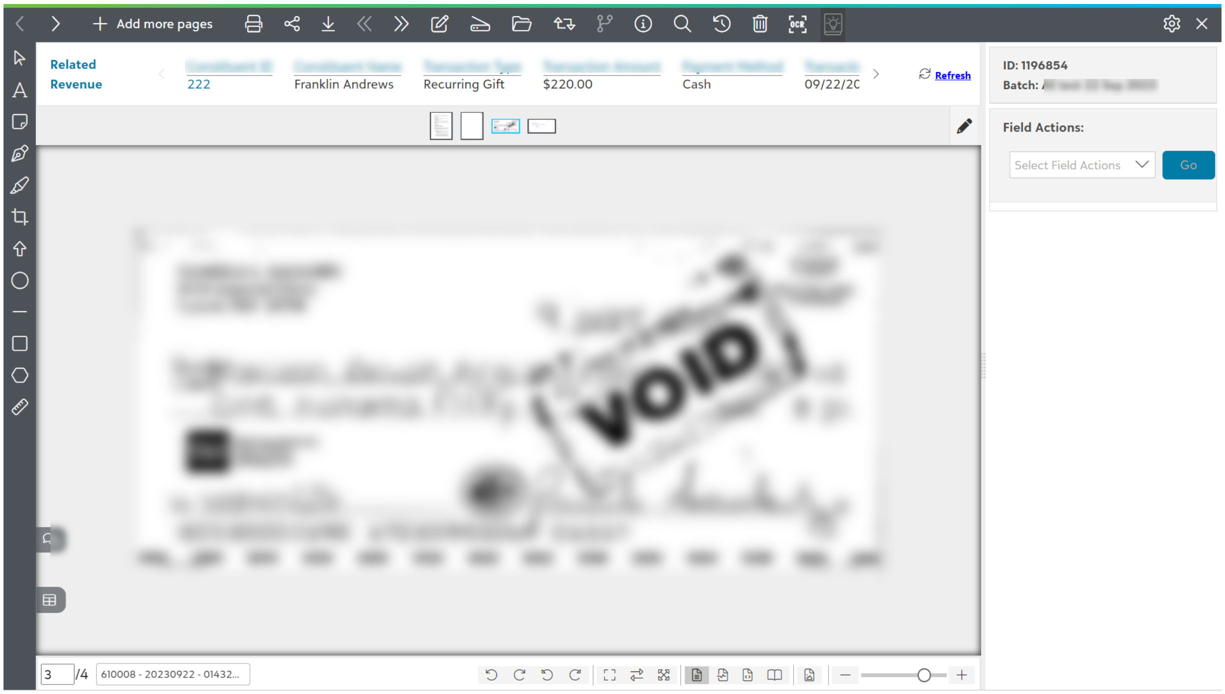
o **Copy Link**: Create the shareable links of the selected documents.

• **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

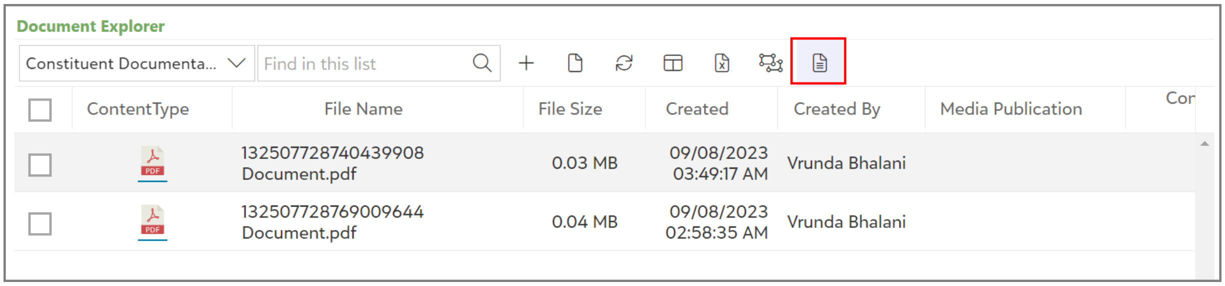
Show Document List within PaperSave options

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

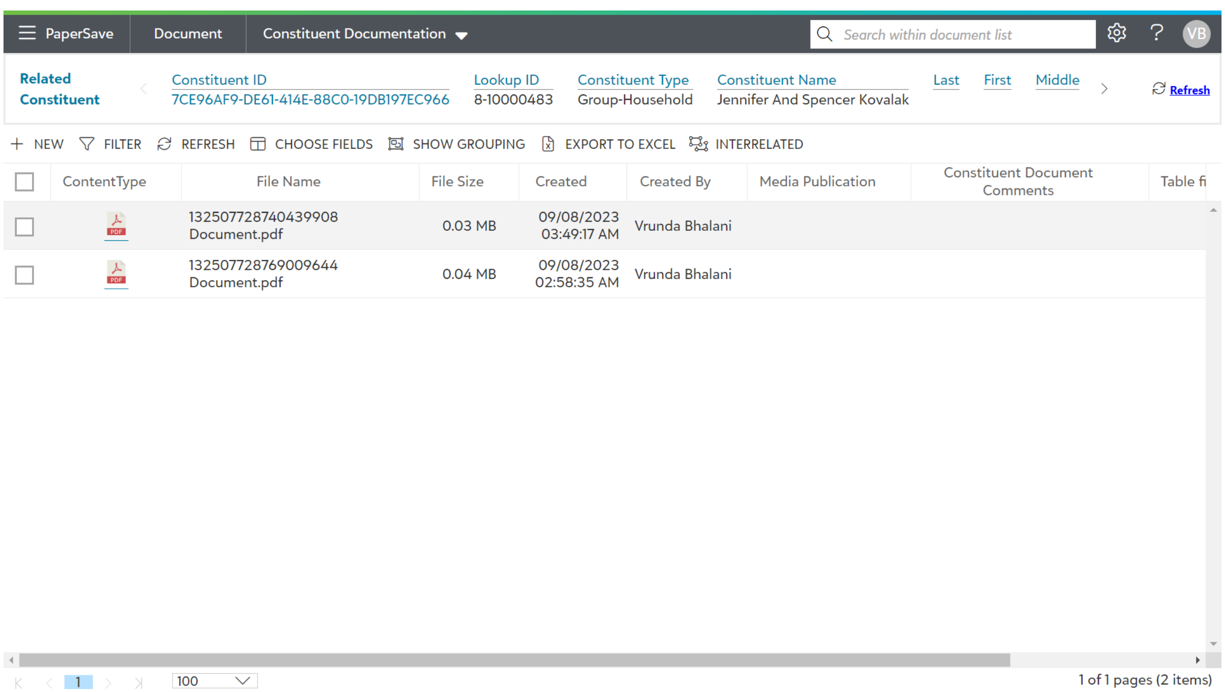
> **Tip:** See this topic to view the steps to open a Blackbaud CRM record type to view and access the Paper-Save options.

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

1) Click on Show Document from PaperSave Grid Toolbar.



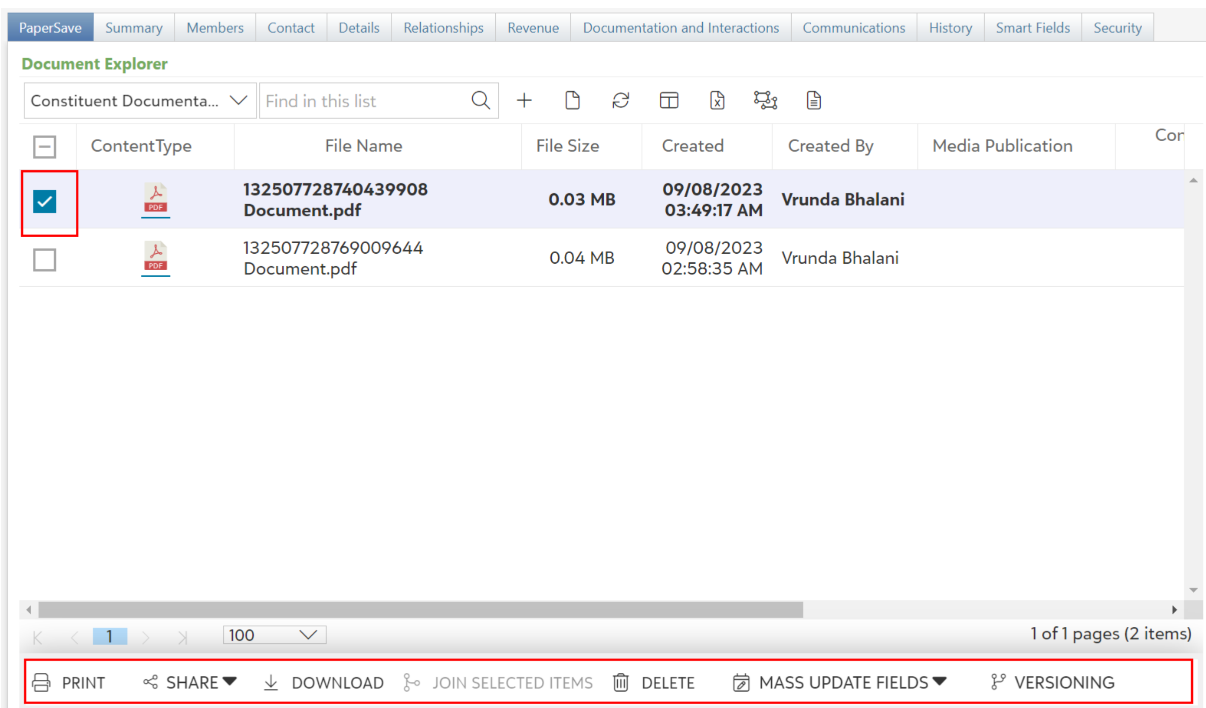
2) This will open Document Display window of PaperSave application. If there are multiple documents associated with a Blackbaud CRM record, then PaperSave document list as shown in the below screen.



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.

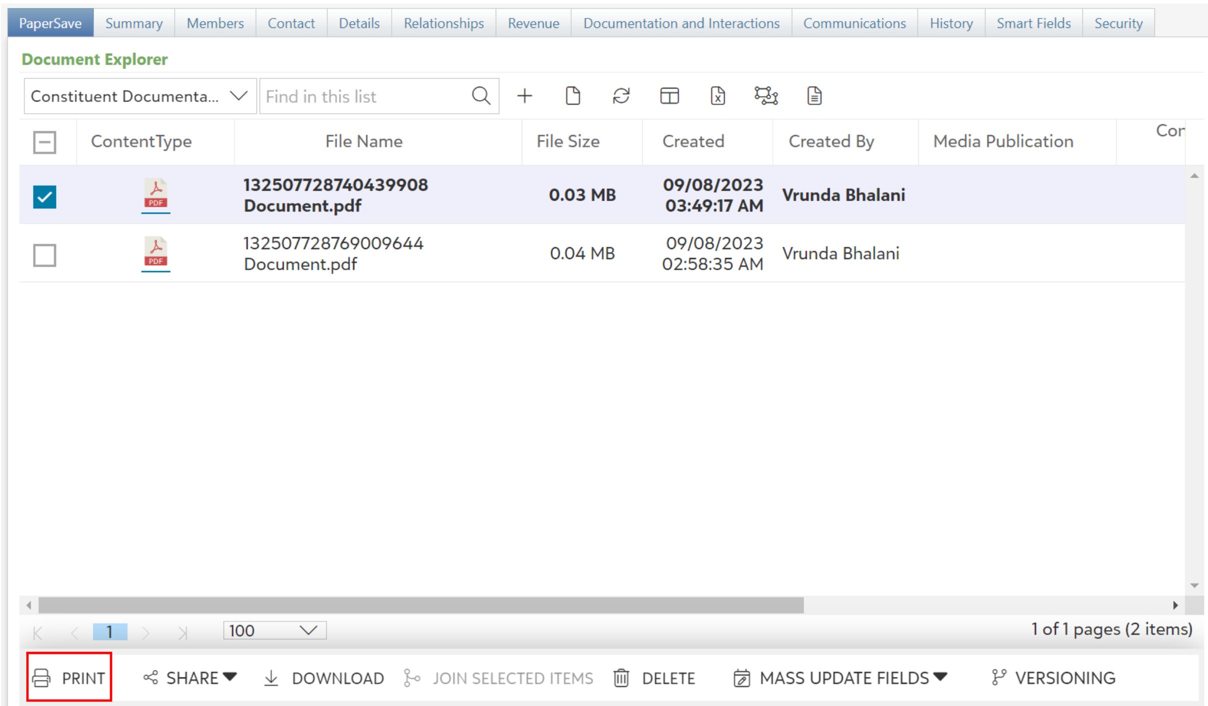


The slide up toolbar contains the following options are:

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.



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

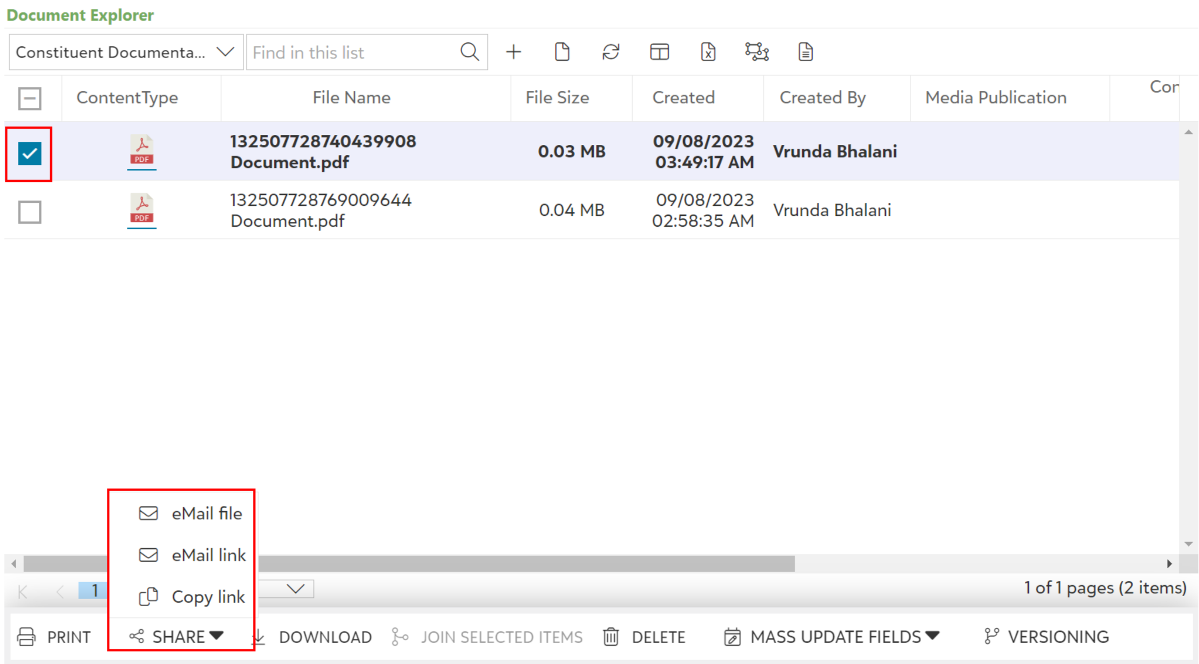
SHARE

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

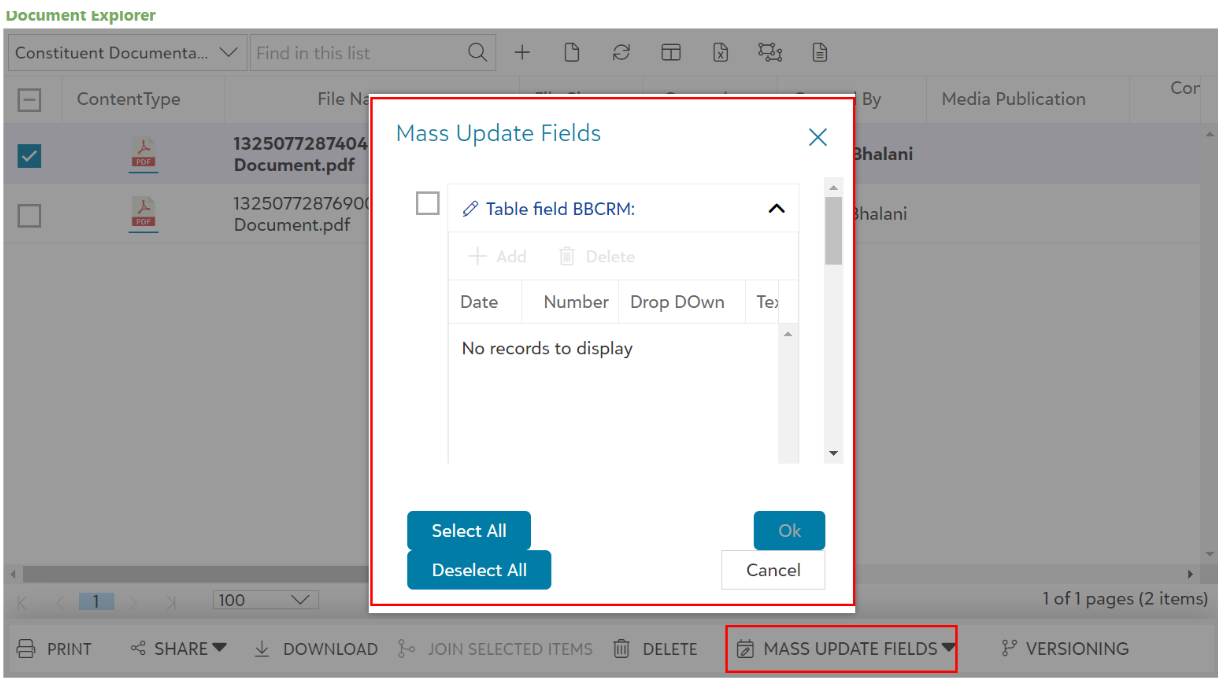
This option allows you to join documents . This option is based on the current user's role and permissions. Learn more about the Join Selected Items option.

DELETE

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

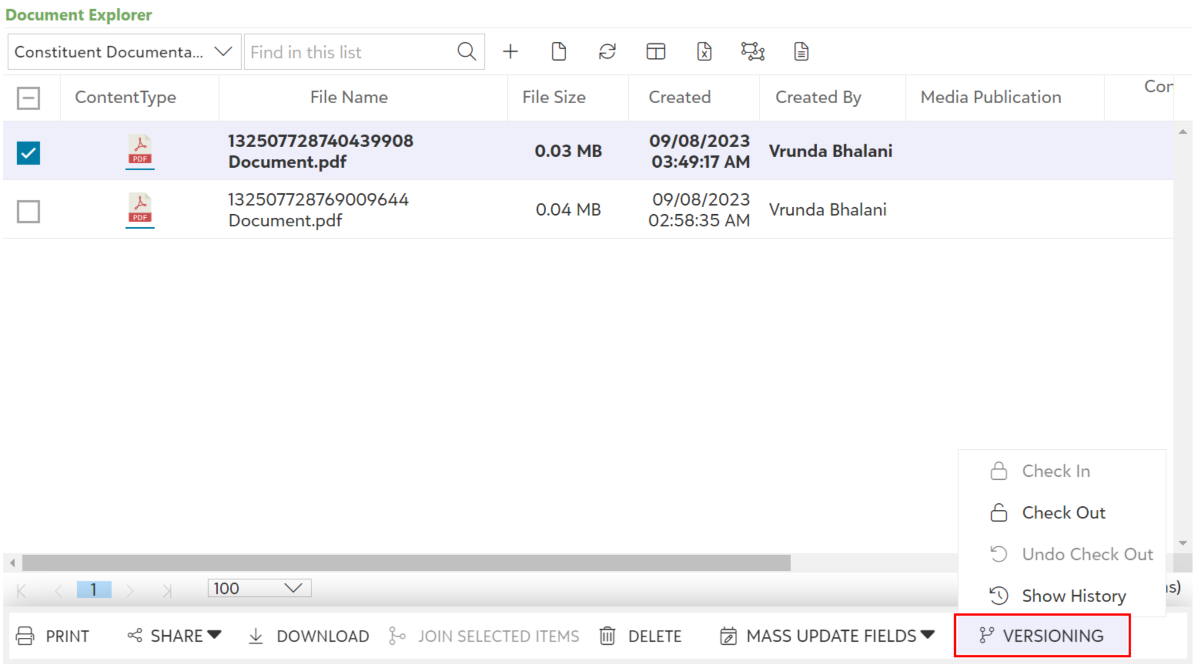
MASS UPDATE FIELDS

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).

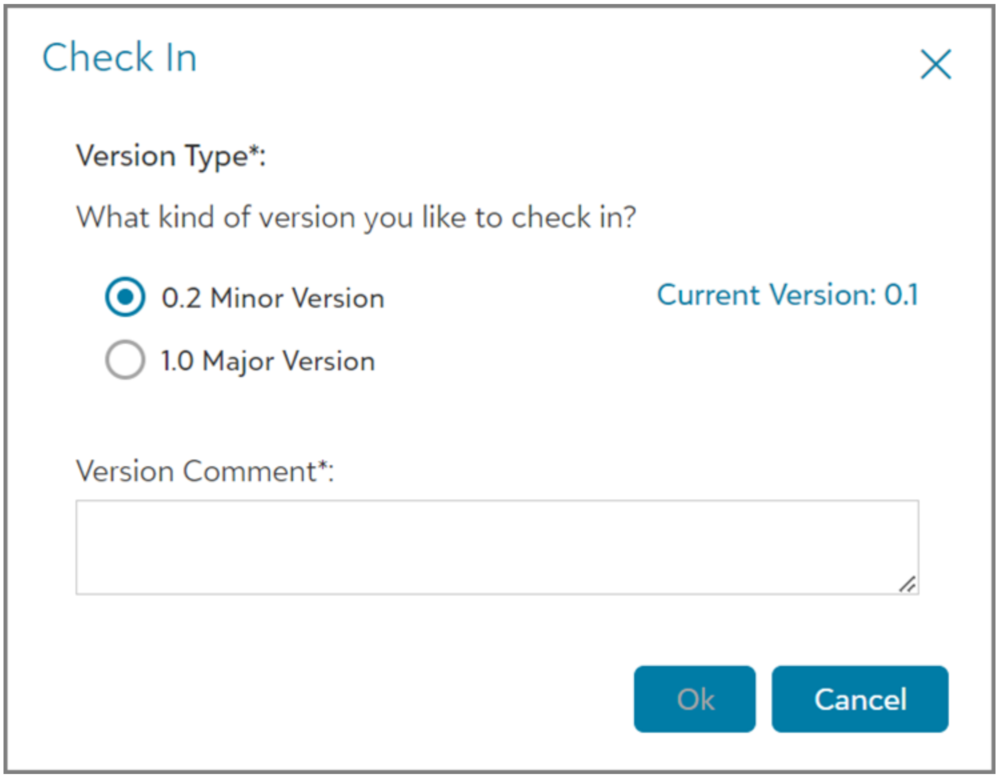
Note: 2) Now, if versioning is enabled, then a current user must have edit document rights on the selected document type and this could be managed from the document types tile in the Configuration Area.

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.



• **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.

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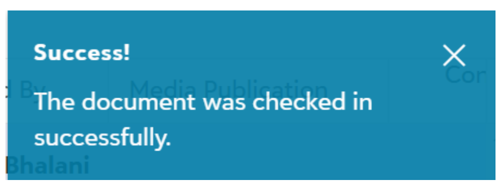
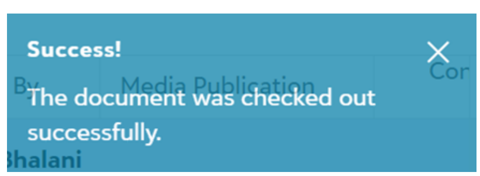
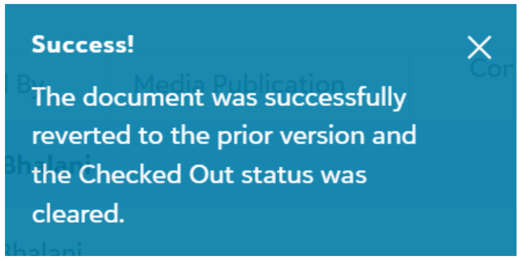


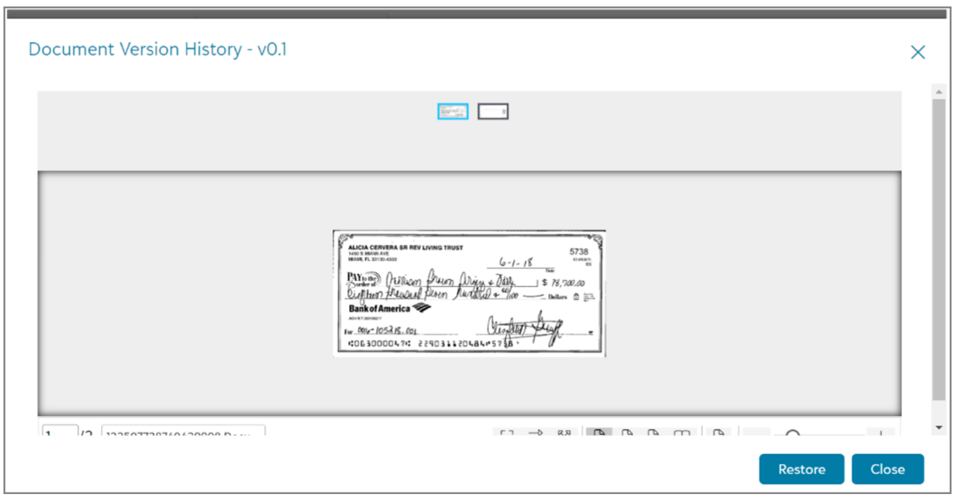
• **Undo Check Out**: This option will undo all the changes made to the document after the latest check-out was made to the document and revert to the prior checked-in version of the document.



• **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.

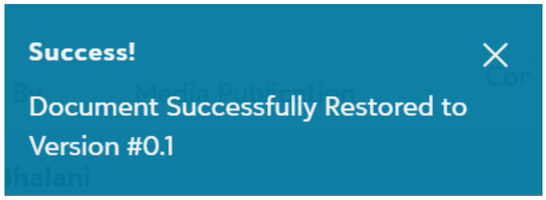


o You can also view the document by clicking View , which will open that version in a pop-up window.



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.

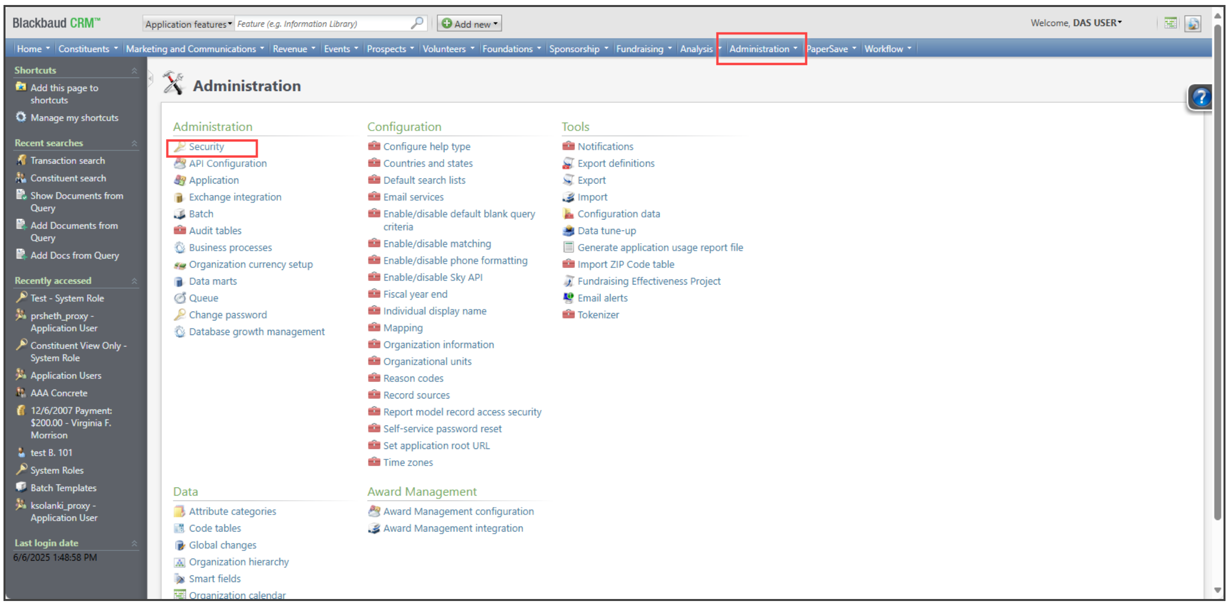
o Once you click on Yes you will get the success message as shown below.



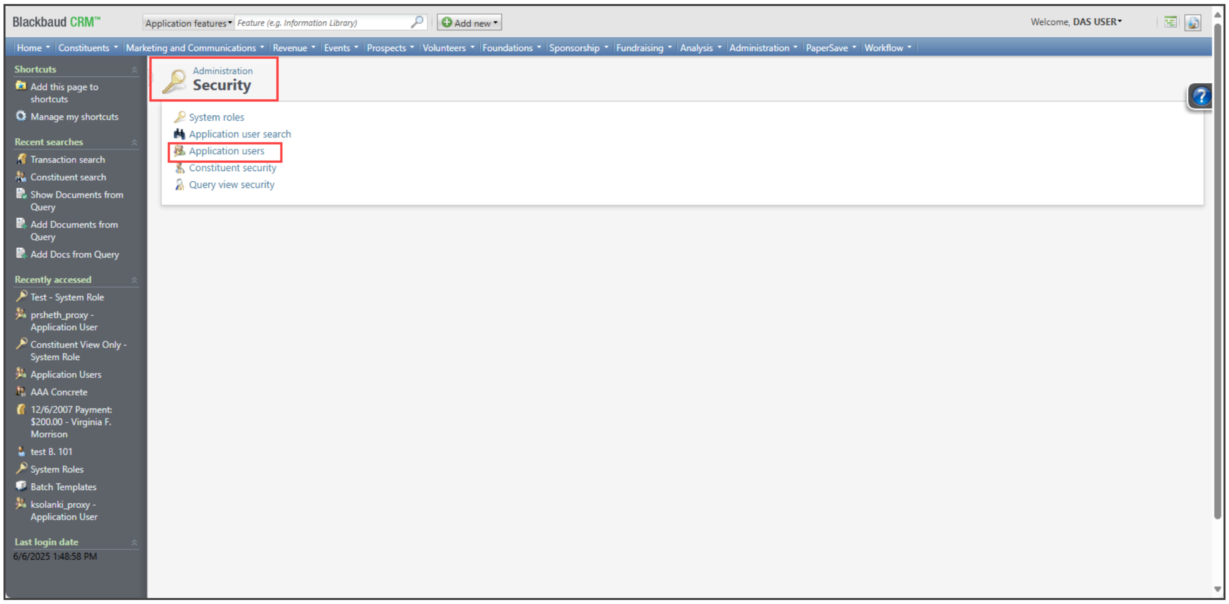
Creating Proxy User in Blackbaud CRM

To create Proxy User, please follow the below steps:

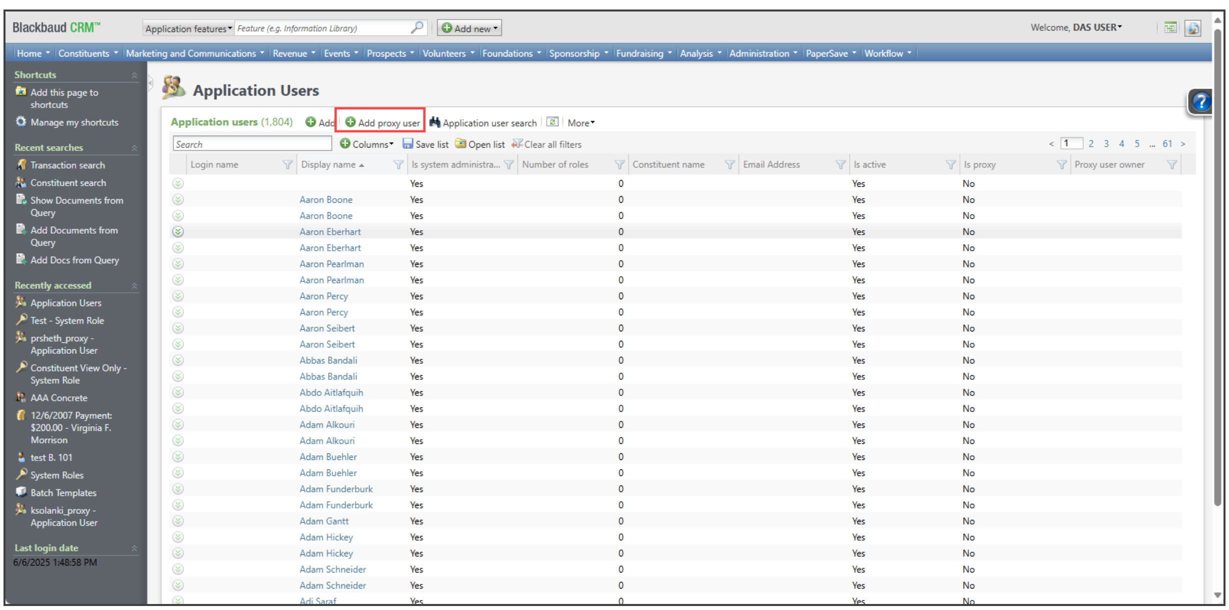
1) Open the Blackbaud CRM application, navigate to **Administration**, and select **Security**.



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

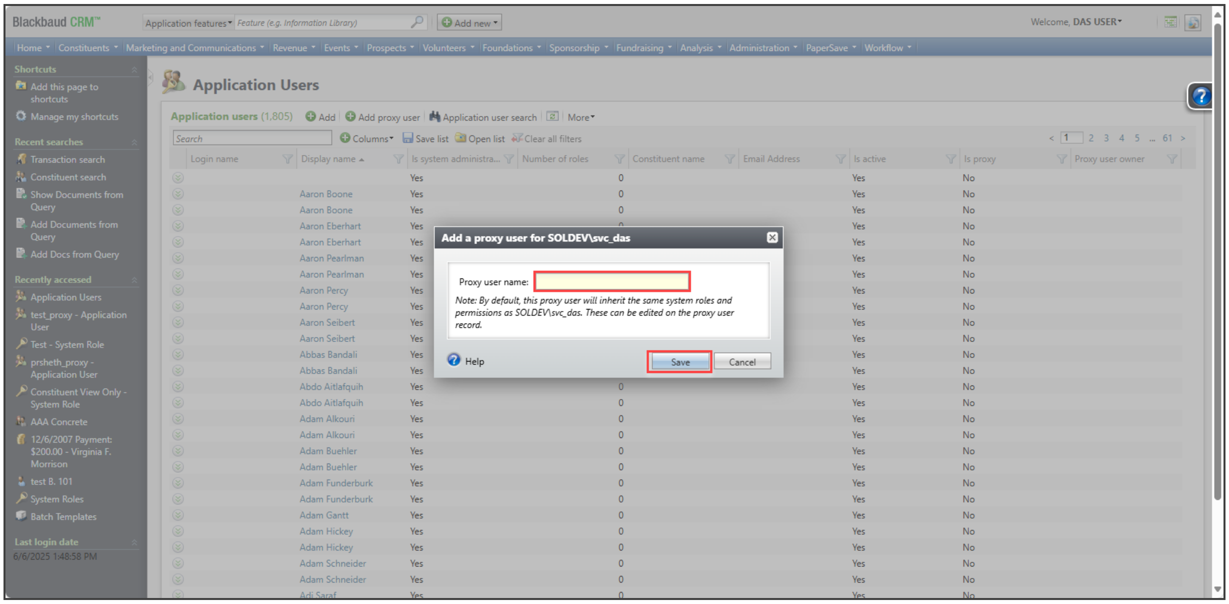


3) On the Application Users page, click on the **+ Add Proxy User** option as shown below.



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

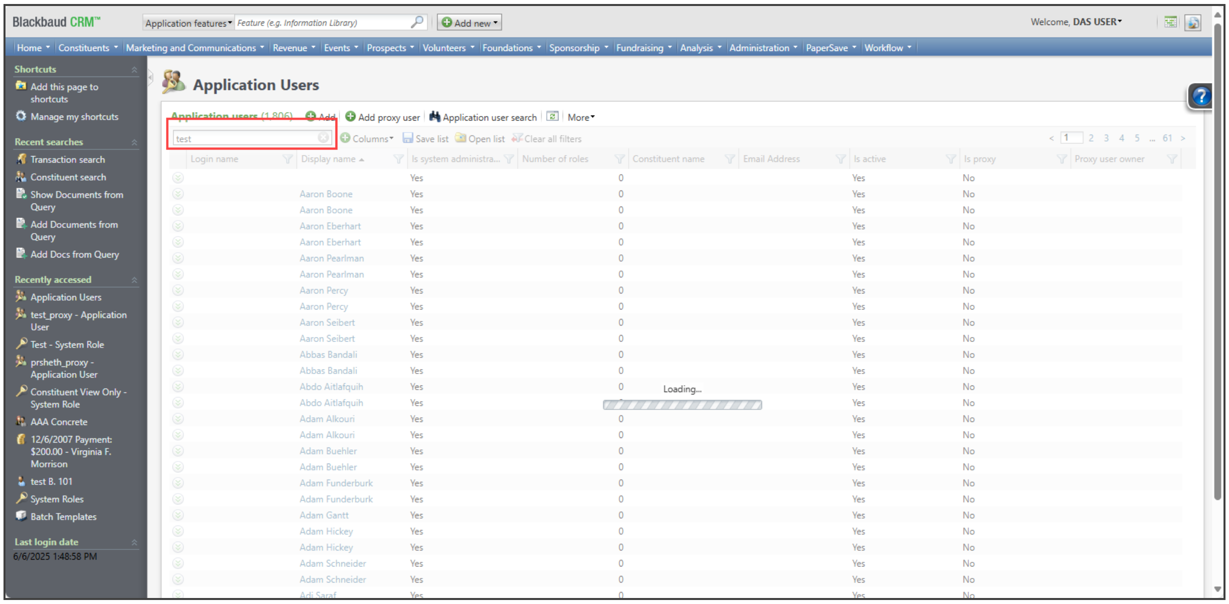
- **Proxy User Name:** Enter a valid name for the proxy user.



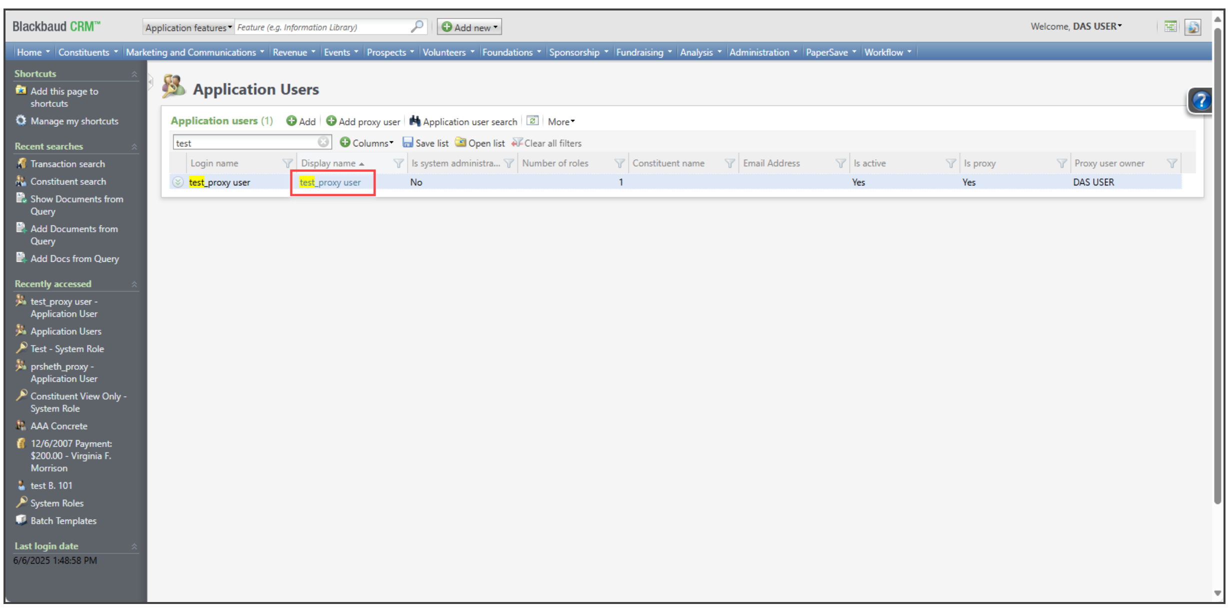
> **Note:** By default, the proxy user inherits the same system roles and permissions as the logged-in user. These can be edited later from the proxy user's record.

5) Click on the **Save** button to save the created proxy user.

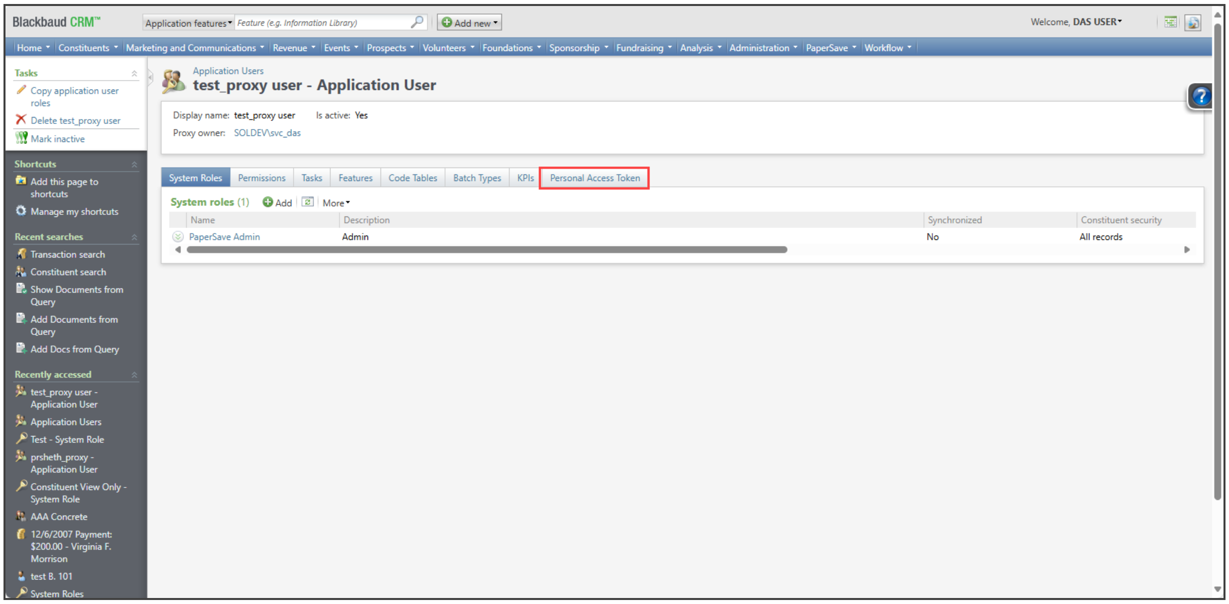
6) Use the search bar to locate the proxy user you have created as shown below.



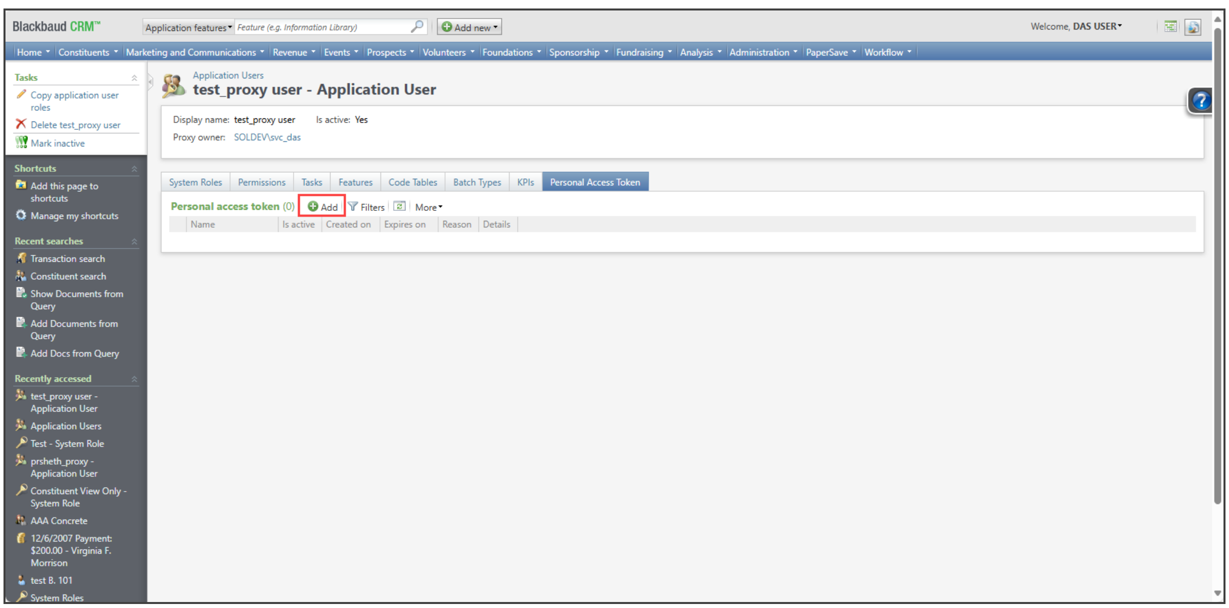
7) Click on the Display Name of the proxy user as shown below.



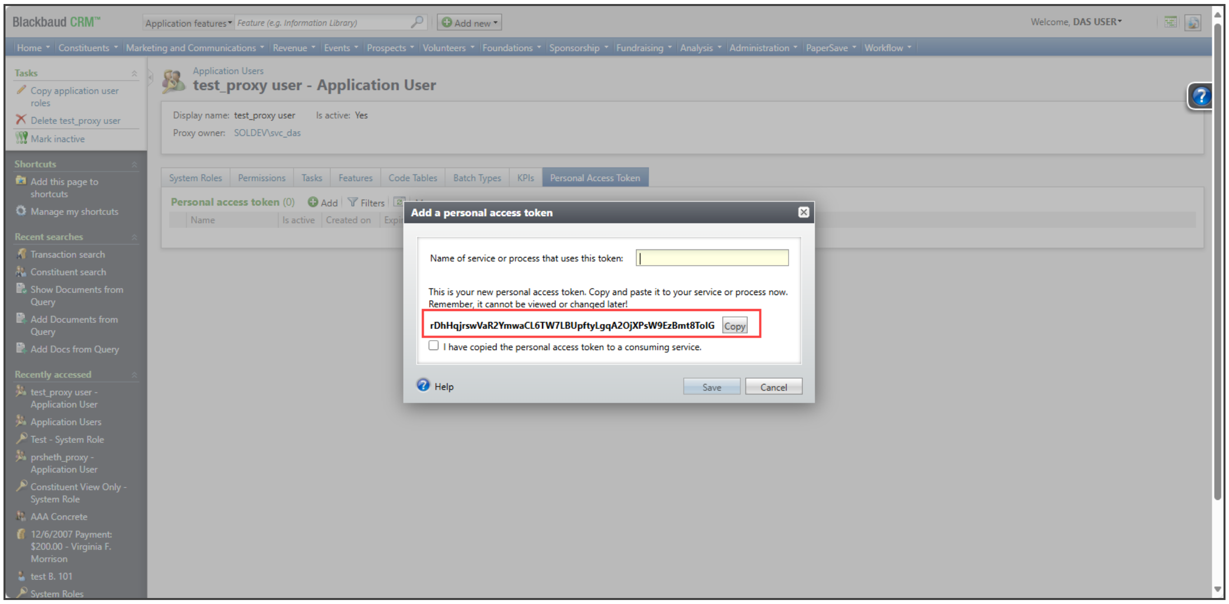
8) Navigate to the **Personal Access Token** tab as shown below.



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

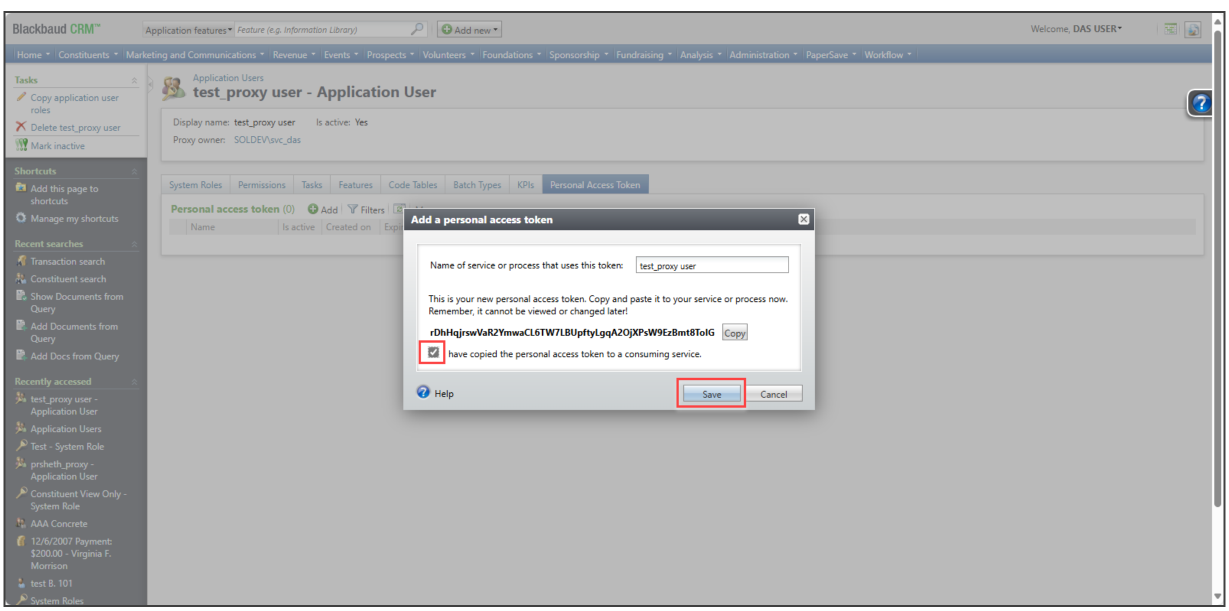


10) Enter a meaningful name for the token in the dialog box that appears as shown below.

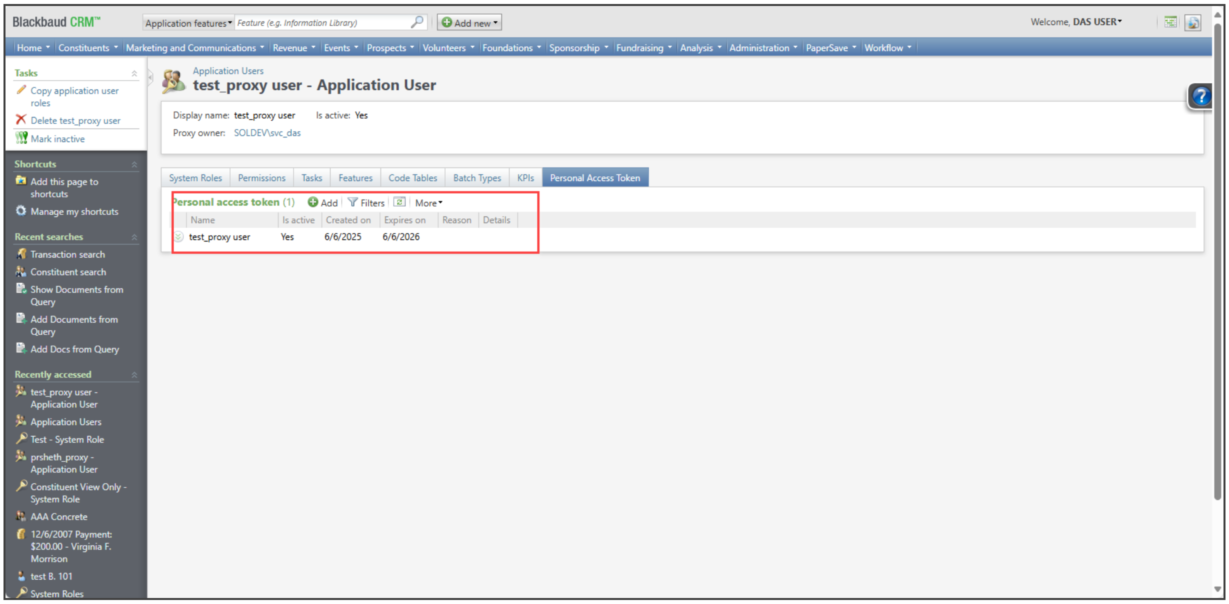


Note: Make sure to copy and securely store the Personal Access Token and the entered name, as they cannot be viewed or retrieved later. These details will be required when adding the integrated app instance.

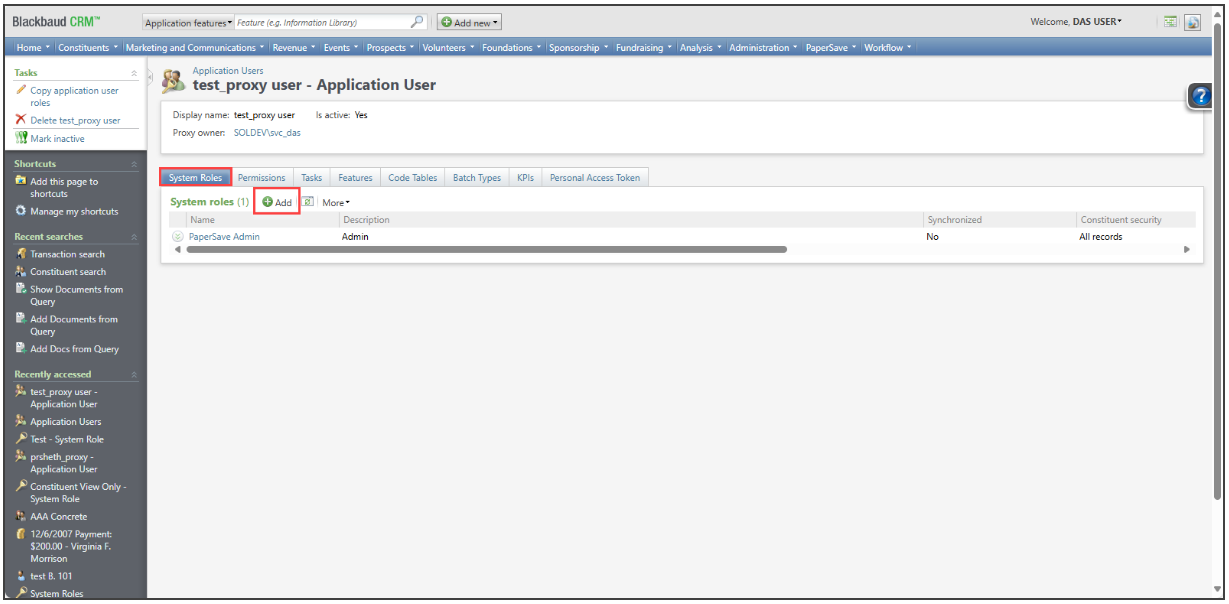
11) Now, tick the checkbox confirming that you have copied the personal access token, and then click on the **Save** button.



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

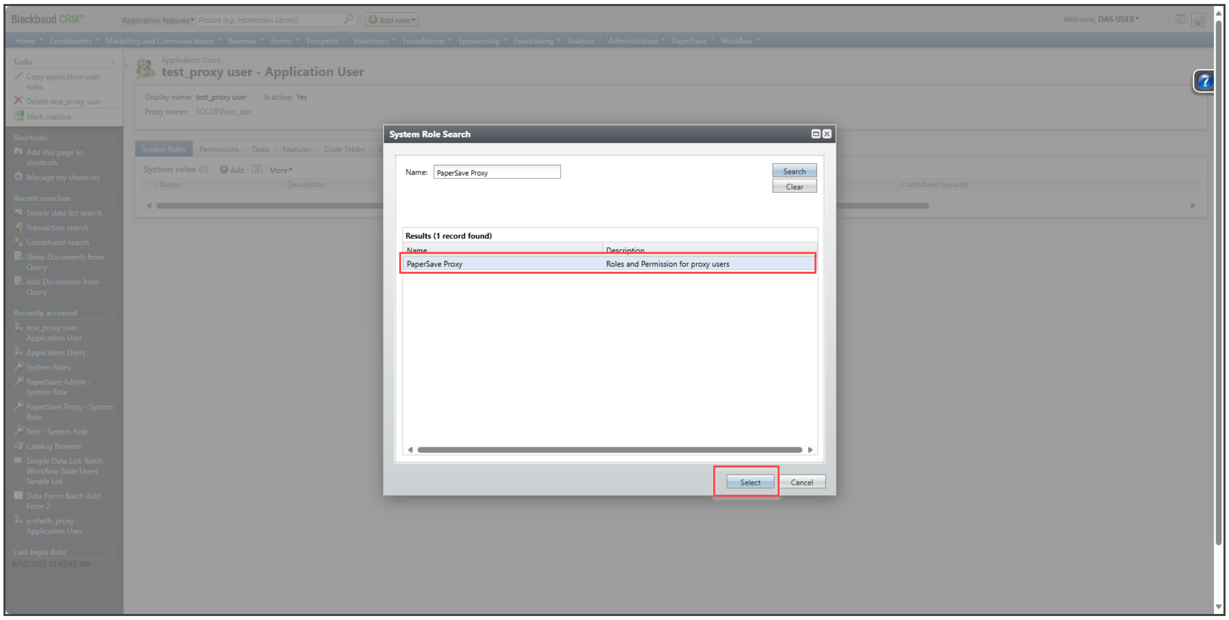


13) Navigate to the **System Roles** tab and click on the **+ Add** button to assign the system role to the proxy user as shown below.

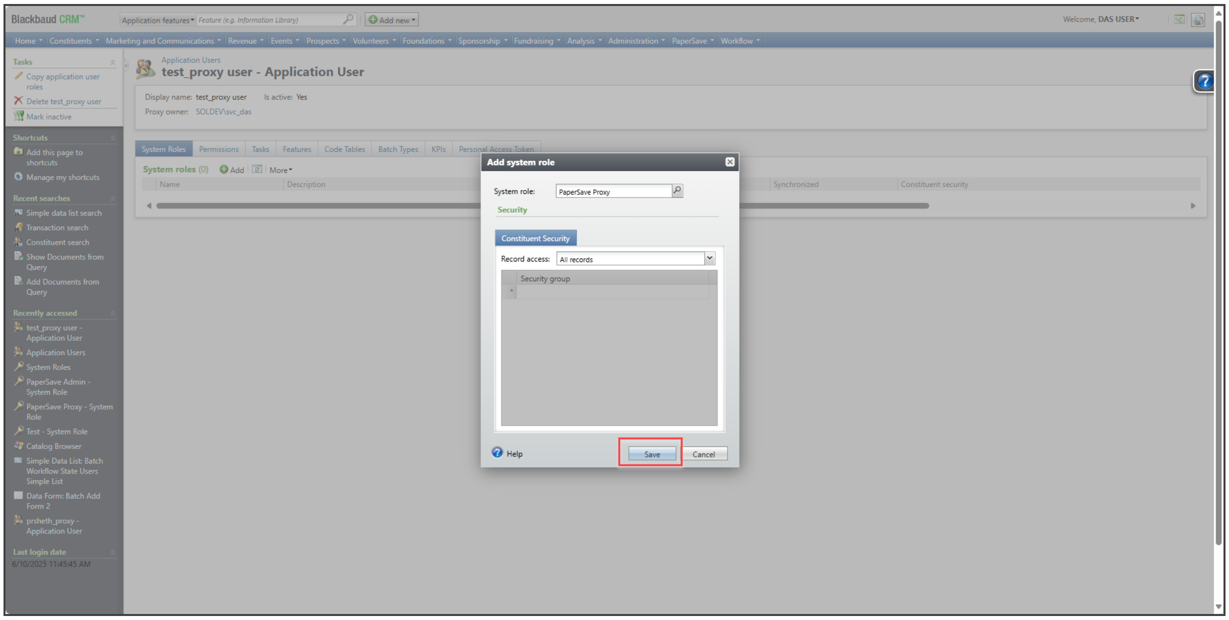


Note: Click here to learn how to create a system role for a proxy user.

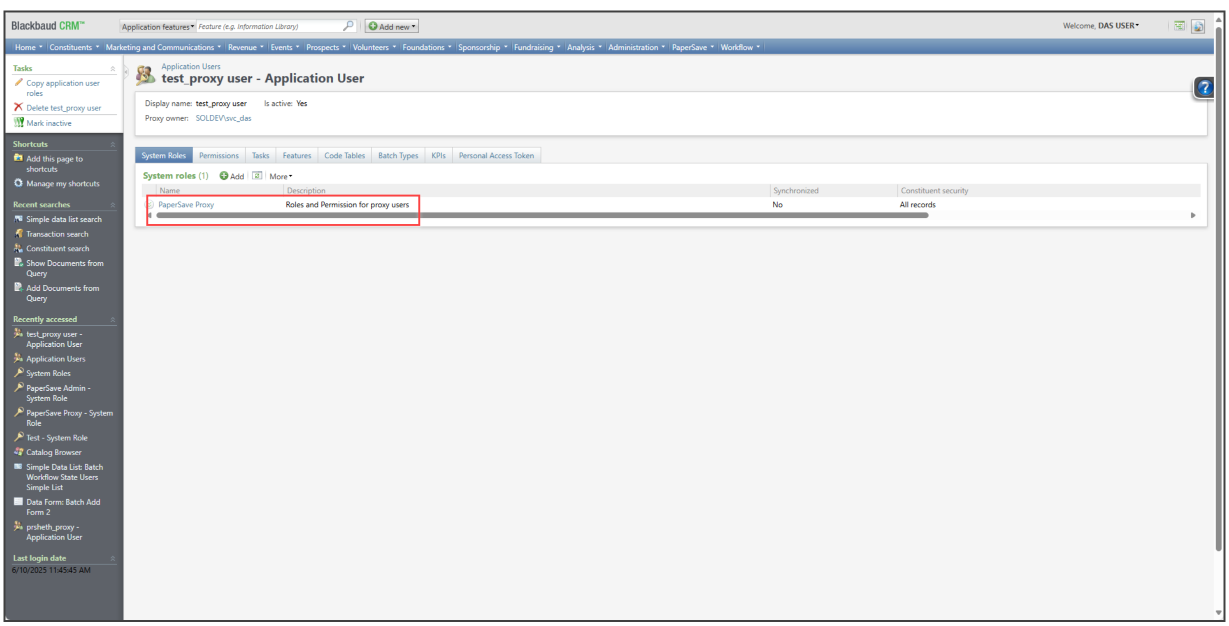
14) Now, search for the system role you created for the proxy user and select it as shown below.



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

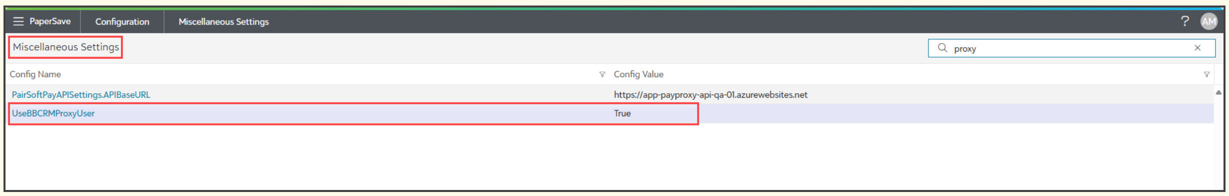


16) Once saved, the assigned role will appear under the System Roles tab for the proxy user as shown below.



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.

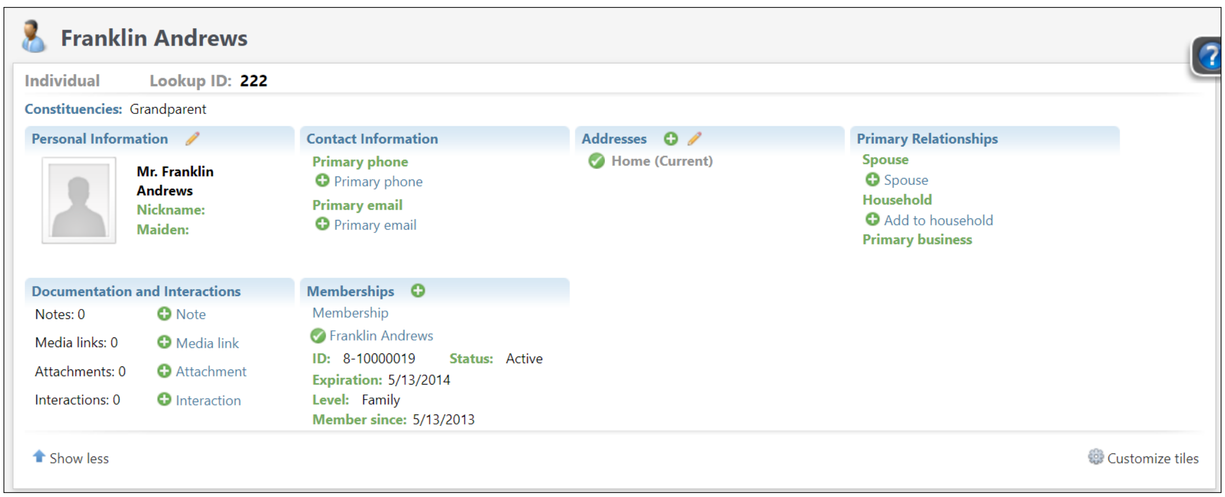


Side by Side Entry

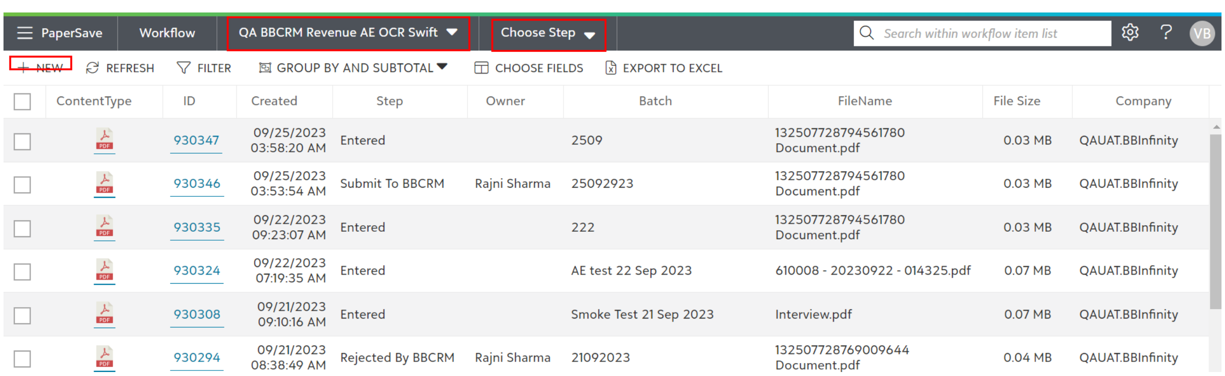
This PaperSave feature allows you to directly associate the workflow item to the BBCRM record. Side by side entry option will appear only when the selected Workflow step has defined "Can Associate" Activity as true.

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.

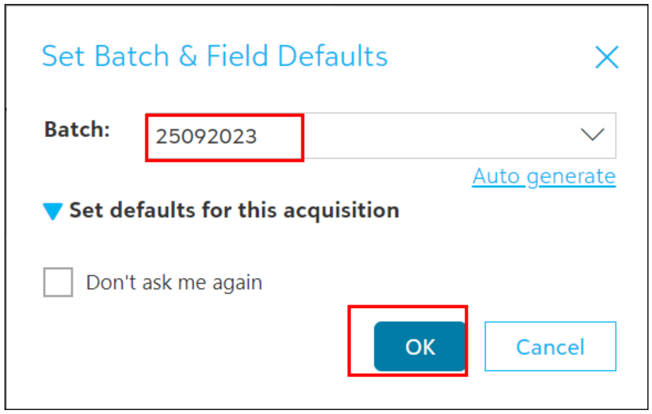


2) Open PaperSave Workflow Area and select the desired workflow and the step where you have defined 'Can Associate' activity as true.



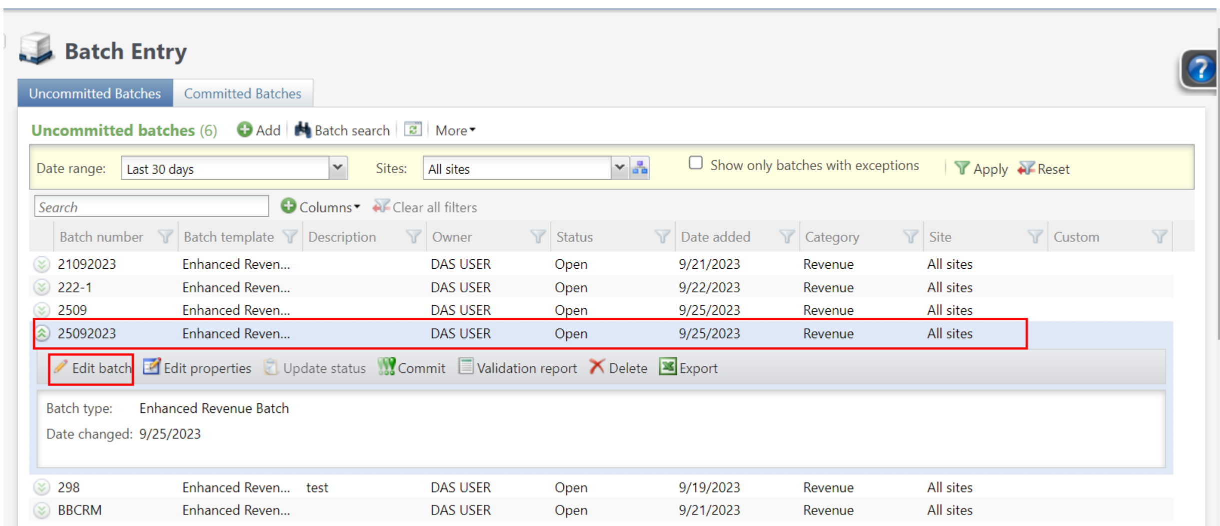
ContentType	ID	Created	Step	Owner	Batch	FileName	File Size	Company
	930347	09/25/2023 03:58:20 AM	Entered		2509	132507728794561780 Document.pdf	0.03 MB	QAUAT.BBInfinity
	930346	09/25/2023 03:53:54 AM	Submit To BBCRM	Rajni Sharma	25092923	132507728794561780 Document.pdf	0.03 MB	QAUAT.BBInfinity
	930335	09/22/2023 09:23:07 AM	Entered		222	132507728794561780 Document.pdf	0.03 MB	QAUAT.BBInfinity
	930324	09/22/2023 07:19:35 AM	Entered		AE test 22 Sep 2023	610008 - 20230922 - 014325.pdf	0.07 MB	QAUAT.BBInfinity
	930308	09/21/2023 09:10:16 AM	Entered		Smoke Test 21 Sep 2023	Interview.pdf	0.07 MB	QAUAT.BBInfinity
	930294	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.

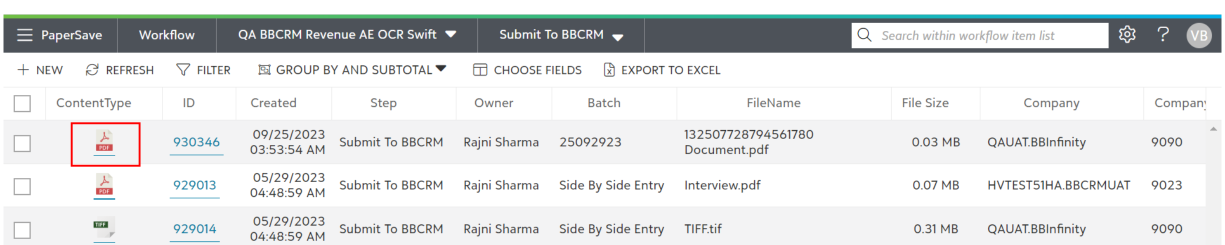


4) Now, enter all the required details in the fields. Make sure, to keep the Constituent of the Lookup id that is mentioned in Step 1. Here, the constituent is Franklin Andrews with the Lookup id 222. After entering the details, submit the document.

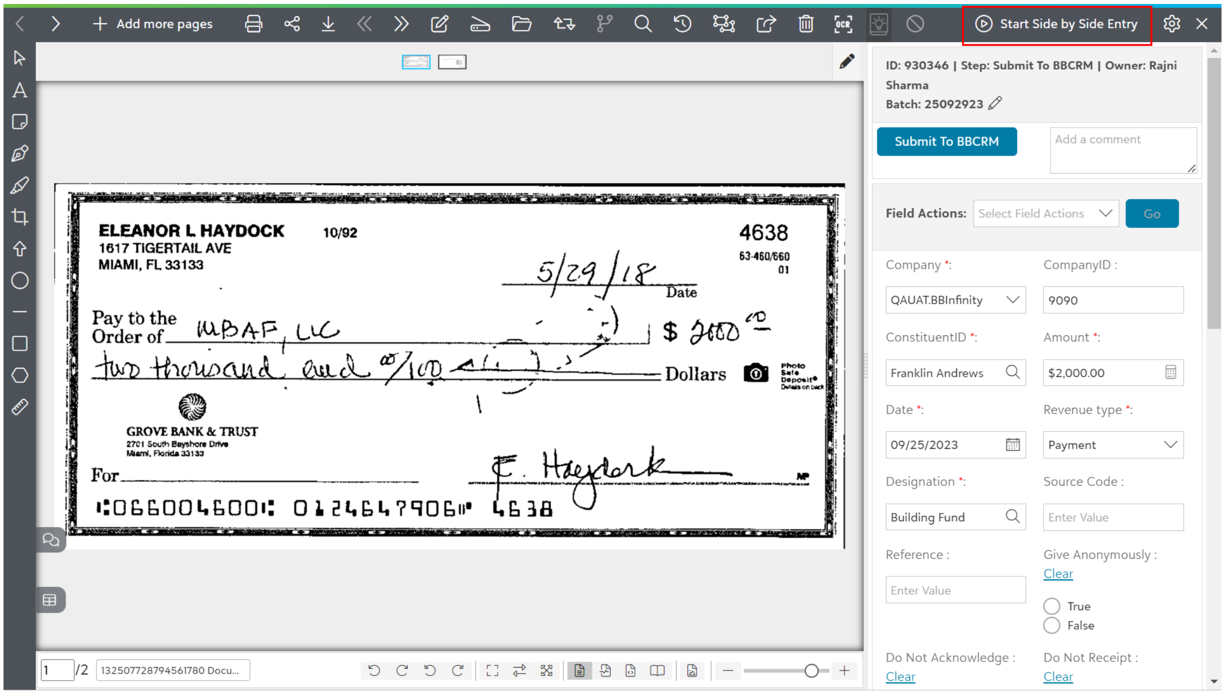
5) Now, open Batch entry in Constituents in BBCRM where you want to perform side by side entry and click on Edit Batch.



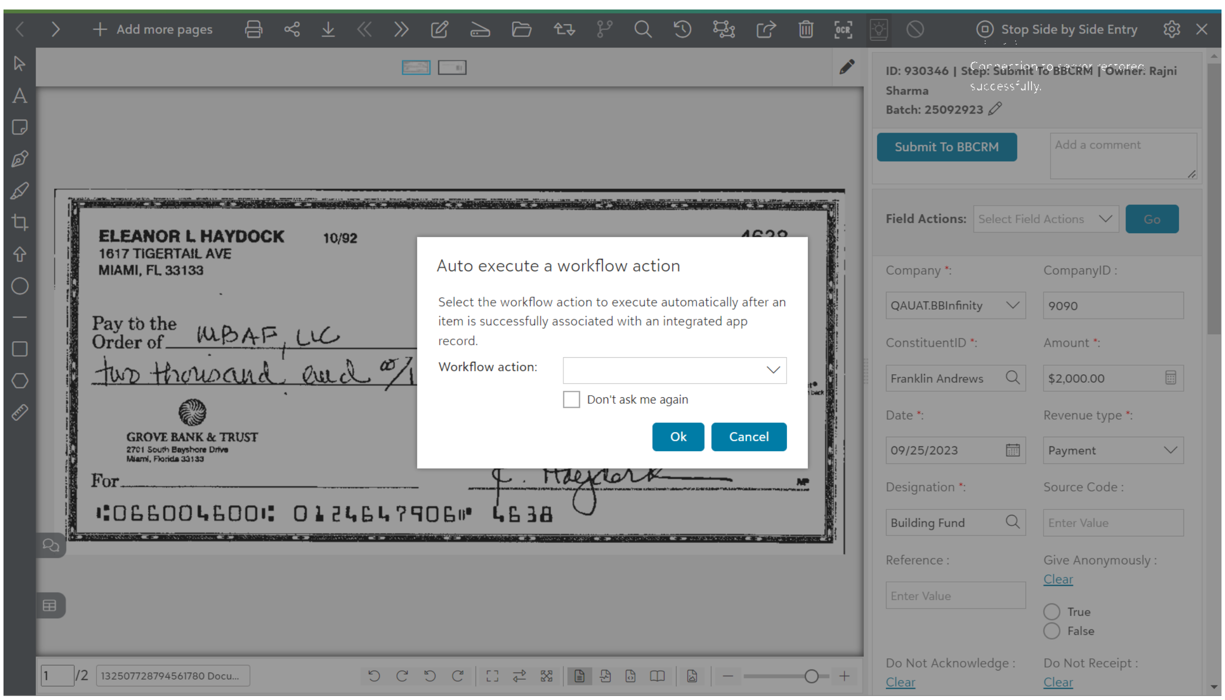
6) Now, go to PaperSave Workflow and open the document on which you want to perform side by side entry.



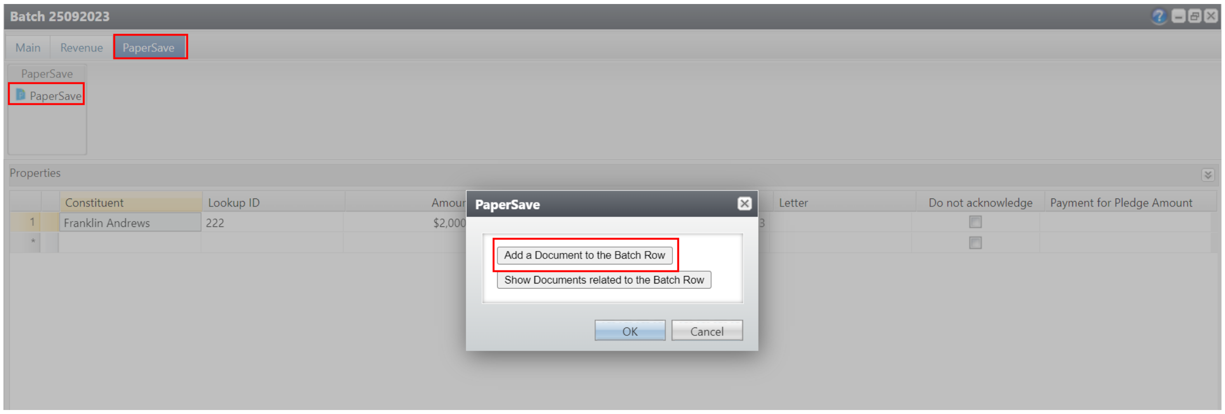
7) The document will look like below. Now, click Start Side by Side Entry.



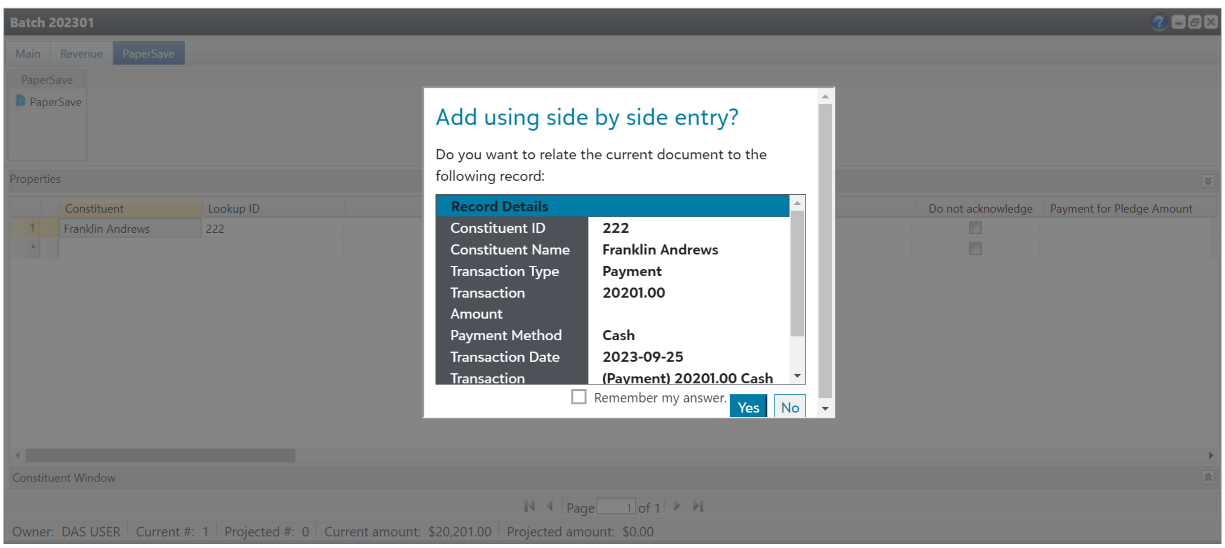
8) A success message is displayed, and a popup opens. Click Ok.



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



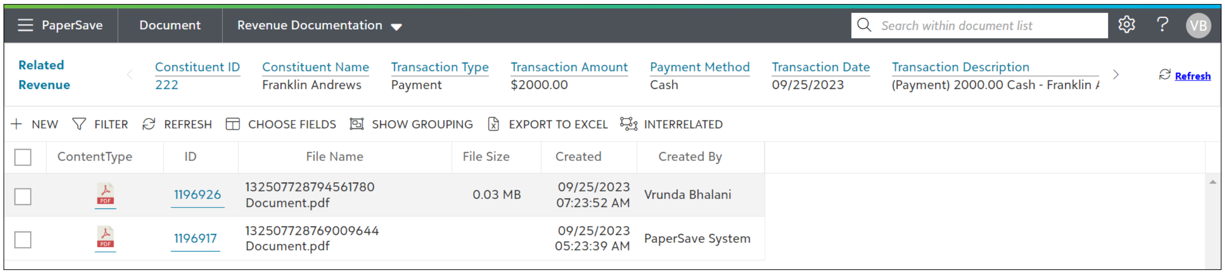
10) It will prompt a confirmation dialog box to Add document using side by side entry as shown in the below screen.



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.



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.

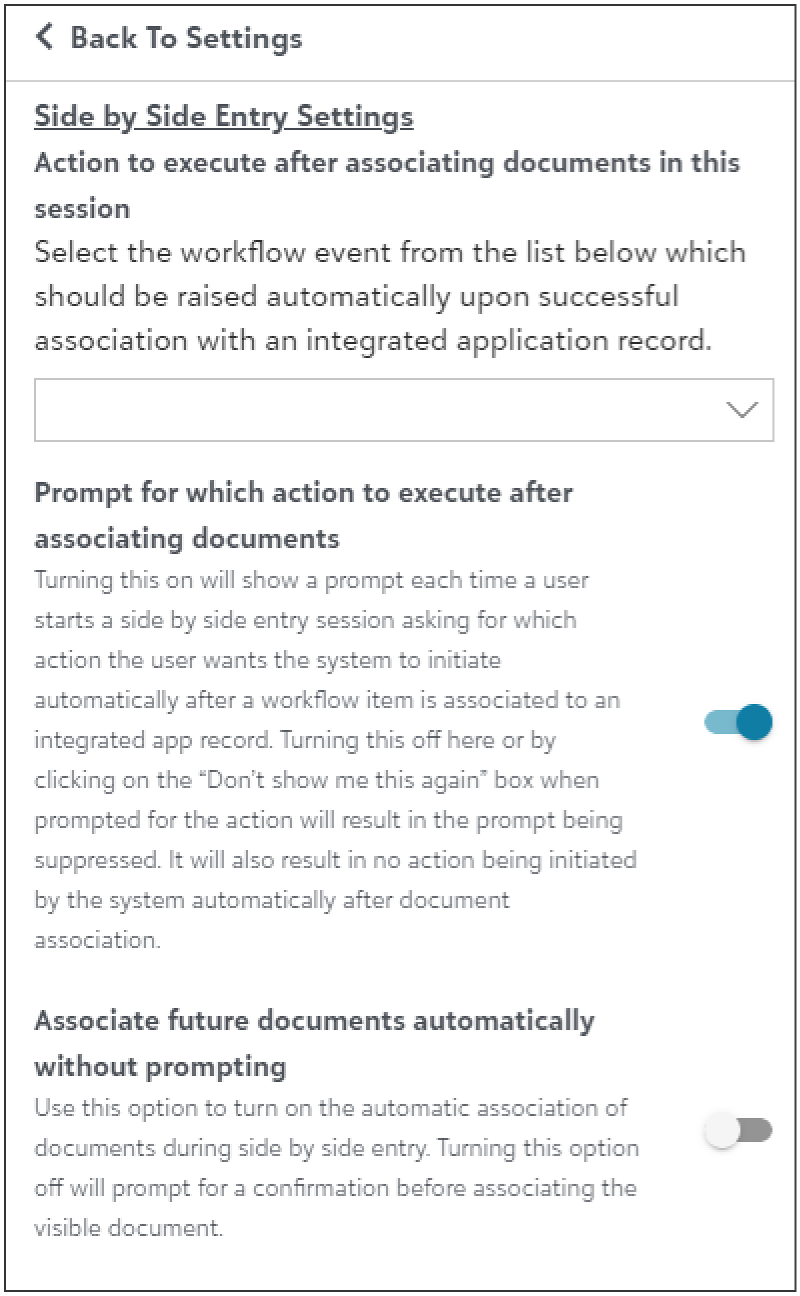
17) Now, open the batch entry in BBCRM, update projected totals and validate the process, and then save and close the batch.

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:



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 PaperSave 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.

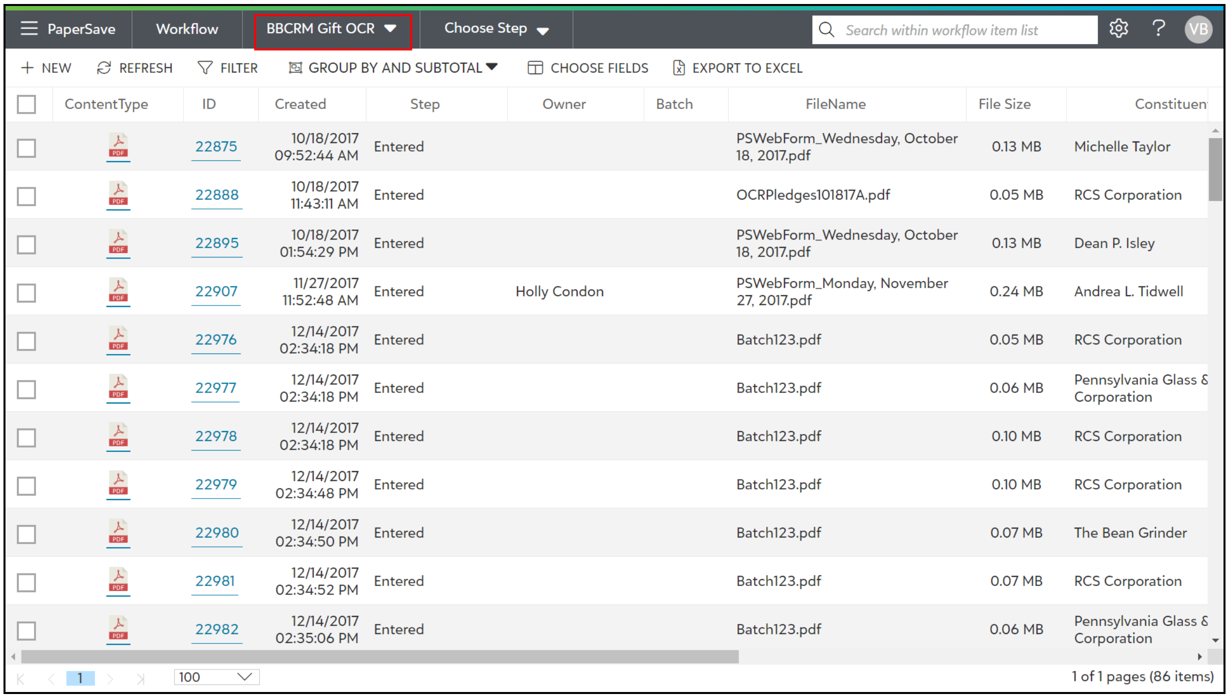
To access and manage Workflow, go to the **Navigation Area** and click on the **Workflow**.

You can learn more about getting started with the Workflow Area in the video.

Choosing a Workflow

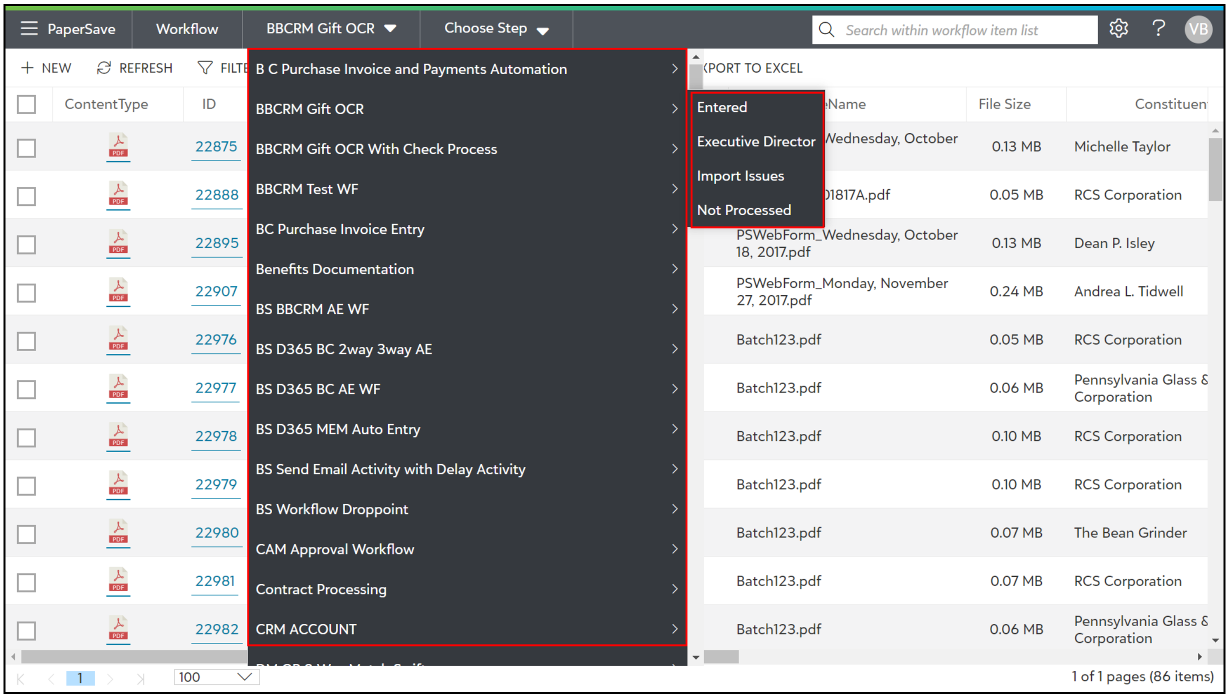
The first step to begin with Workflow Area is to choose a Workflow from the available list of Workflows.

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



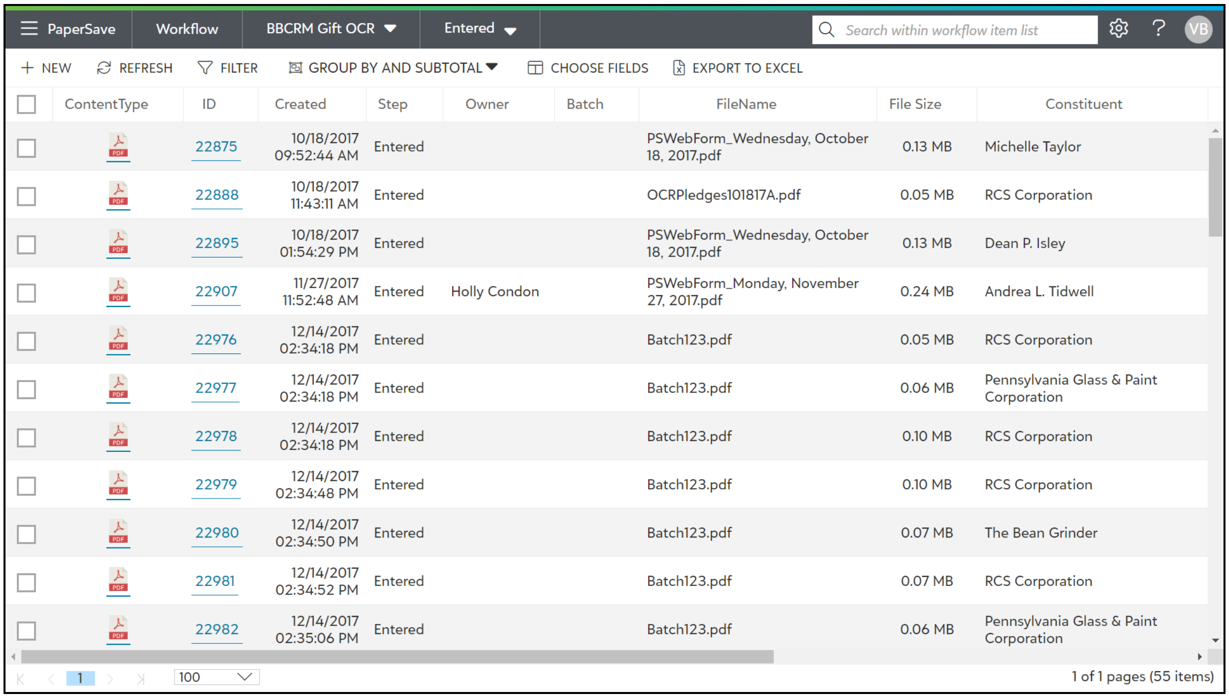
2) You will see a list of available Workflows in the dropdown. Click on the desired Workflow from the list as shown below. Also, you can optionally select the Workflow step from the "**Choose Step**" dropdown to access the Workflow items that belong to a specific Workflow step.

> **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.



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.



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

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

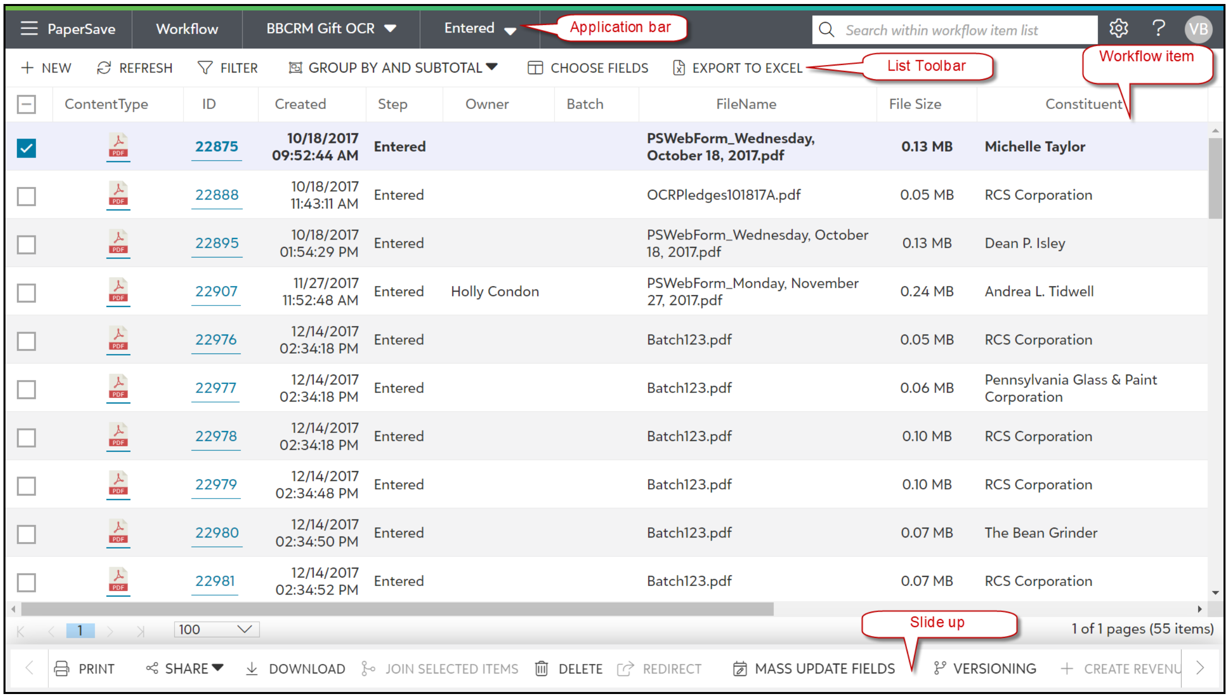
The Workflow item list is the first view you see when you open the Workflow Area. Once you have selected a Workflow and Step, the related items will be displayed in a grid (list) format with various options allowing you to manage the items in the list.

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 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.

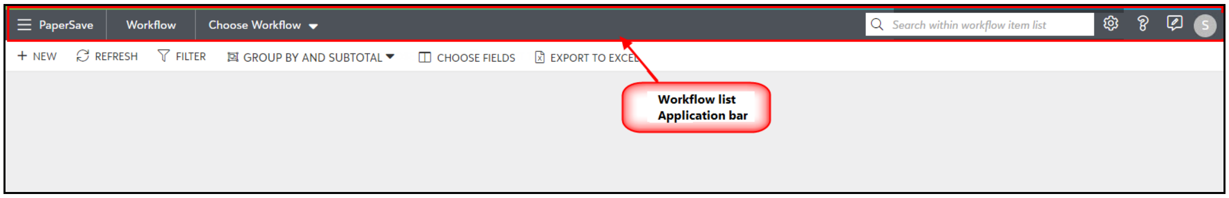
6) **Status bar**: The status bar displays information about the list such as Page number, Page size, Filter applied (if relevant), Clear filter option (if relevant), Total Items, etc. Click here for more details.

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

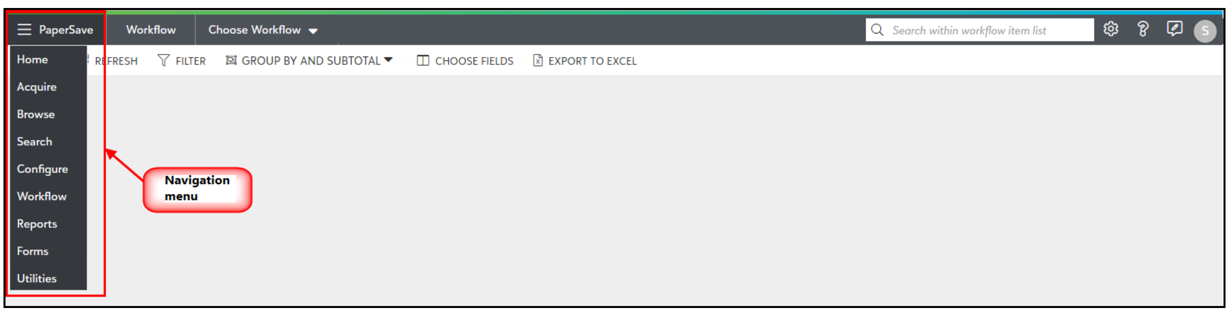
The Workflow Area presents an Application bar in the Workflow item list, as shown in the below image.



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

1) Navigation Menu

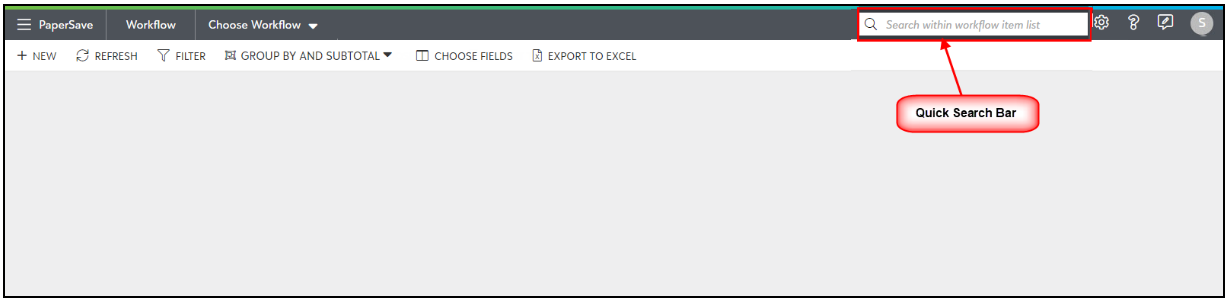
You can navigate to Home and other PaperSave Areas such as Acquire, Browse, Search, Configuration, Workflow, Reports, Forms, and Utilities. Click on the ☰ icon in top-left corner of the screen, and select the module that you need to access as shown below:



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.



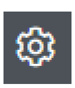
Note: Quick Search mechanism is case insensitive and also supports various special characters in the search criteria as follows:

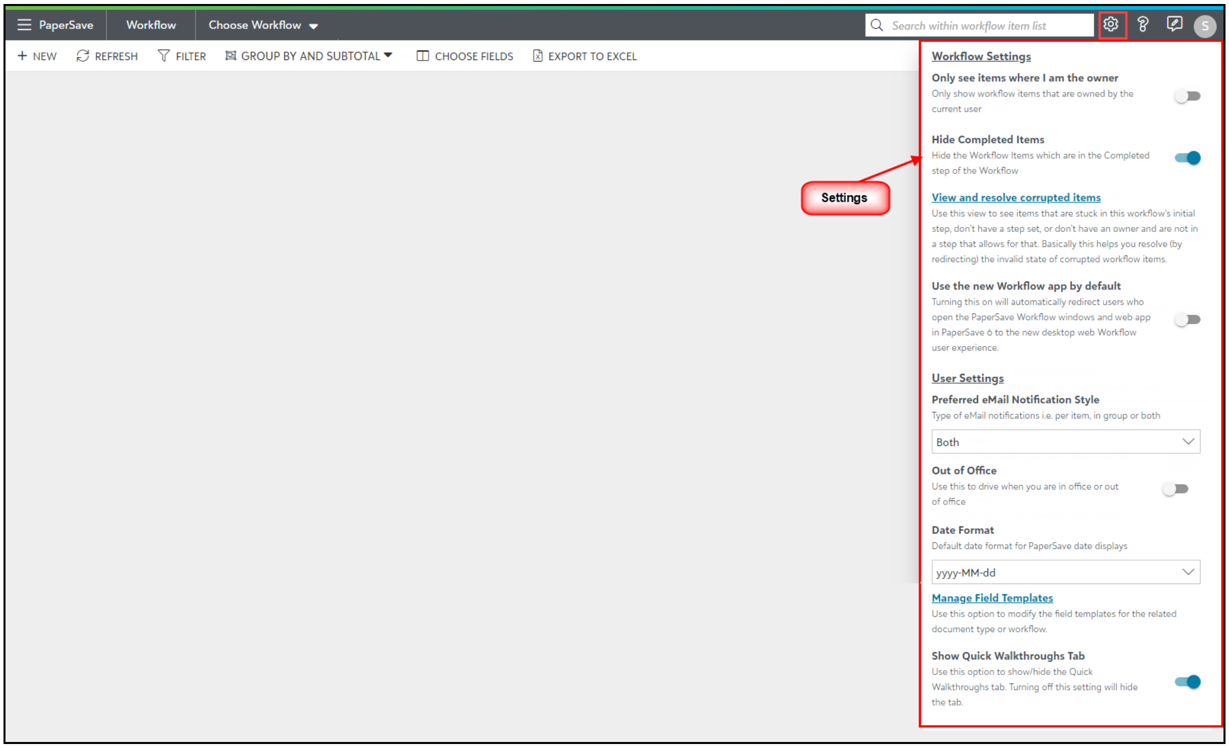
Supported Special characters:
o ~ ` ! @ # $ % ^ & * ( ) _ - + = { } | [ ] \ ; : '" < > ? , . /

Supported Spanish characters:
o á, é, í, ó, ú, ñ, ü, ¿, ¡

Supported French characters:
o ë, 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.



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:

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

"Only see items where I am the owner" in Settings	Current User is	Can view Workflow Items?
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.

"Hide completed items" in Settings	Current User is	Can view Workflow Items in Completed step?
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

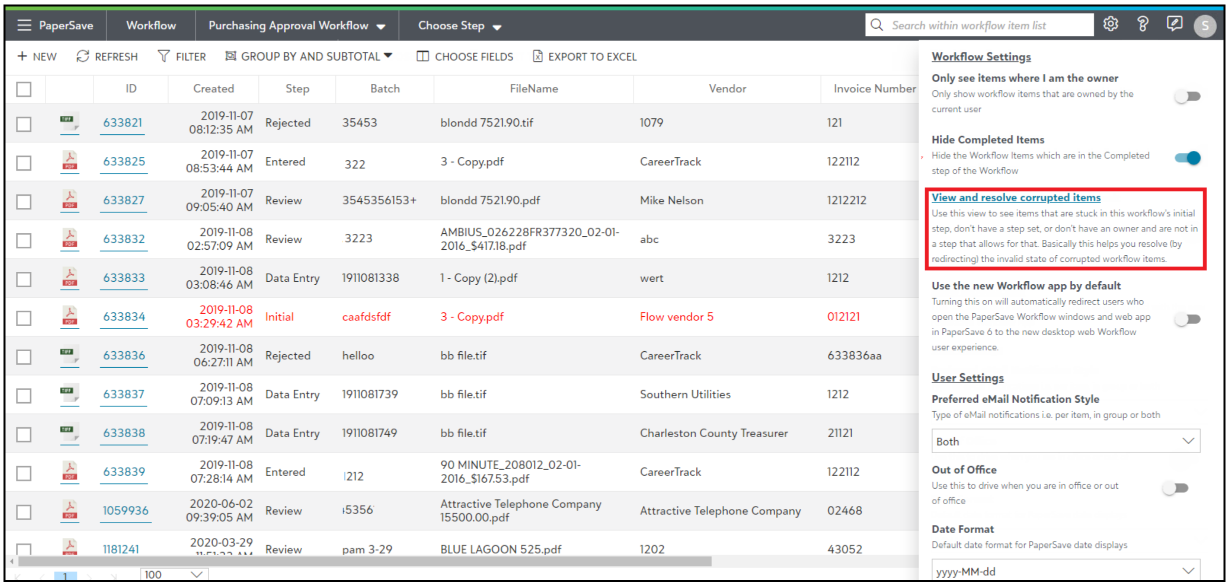
> **Note:** Only Workflow Administrator or Workflow Super Admin have the Workflow access rights "**Groups/Users who can view into the completed step in the workflow"** to view the completed items and resolve the corrupted workflow items.

- **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

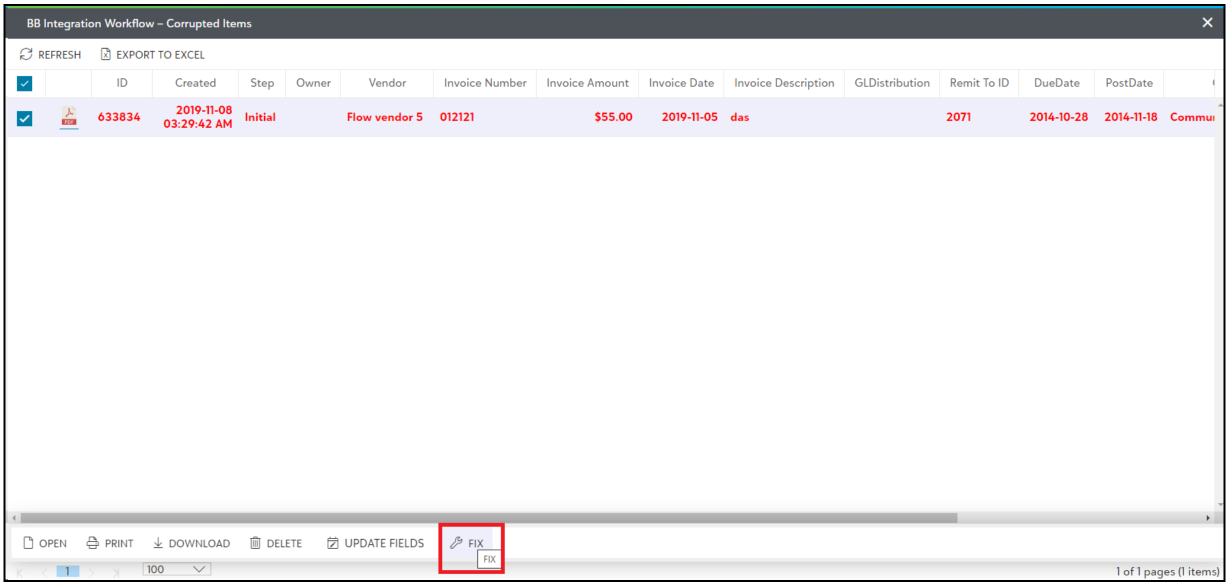
Watch the video to learn how to use "View and resolve corrupted items" feature.

- 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.



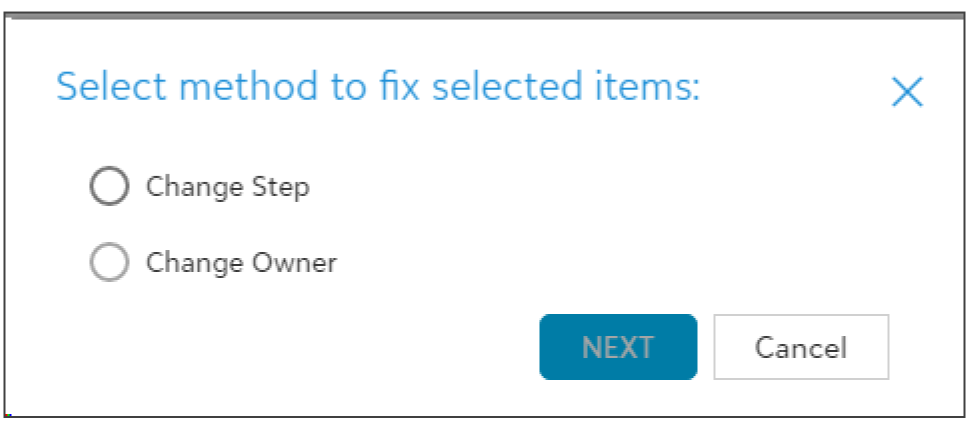
- Once you are redirected to the list of Corrupted items, select one or more item(s) from the list and click on **FIX** to start resolving the corrupted item(s).



- 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.



- **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 Work-flow 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:

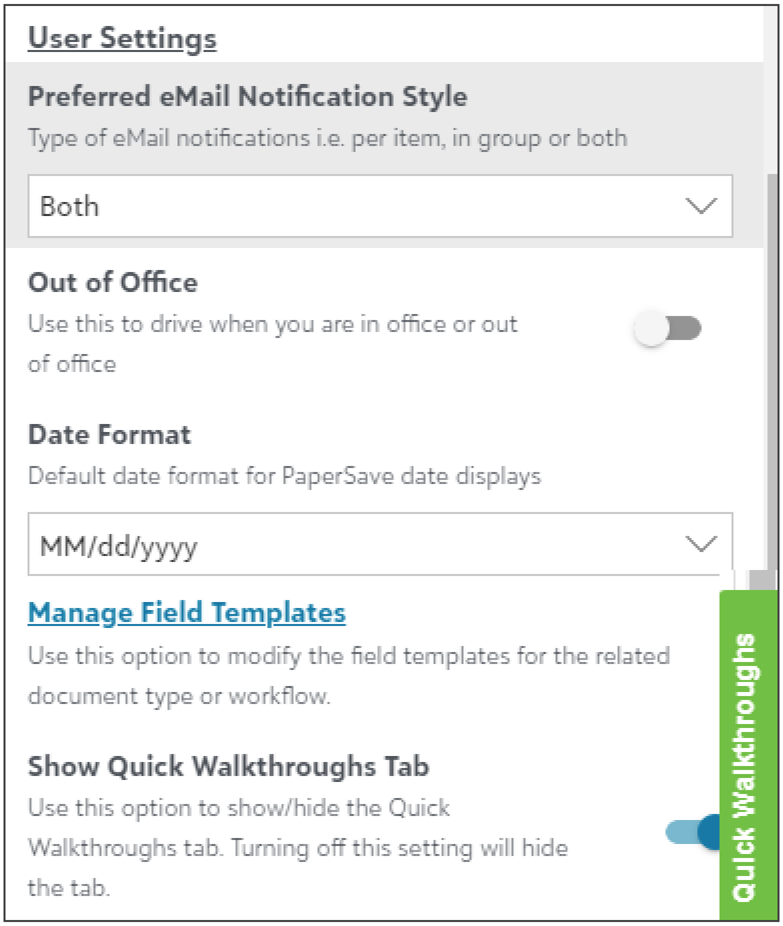
- MM-dd-yyyy
- MM/dd/yyyy
- dd-MM-yyyy
- dd/MM/yyyy
- yyyy-MM-dd

- **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 Walk-through** 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**

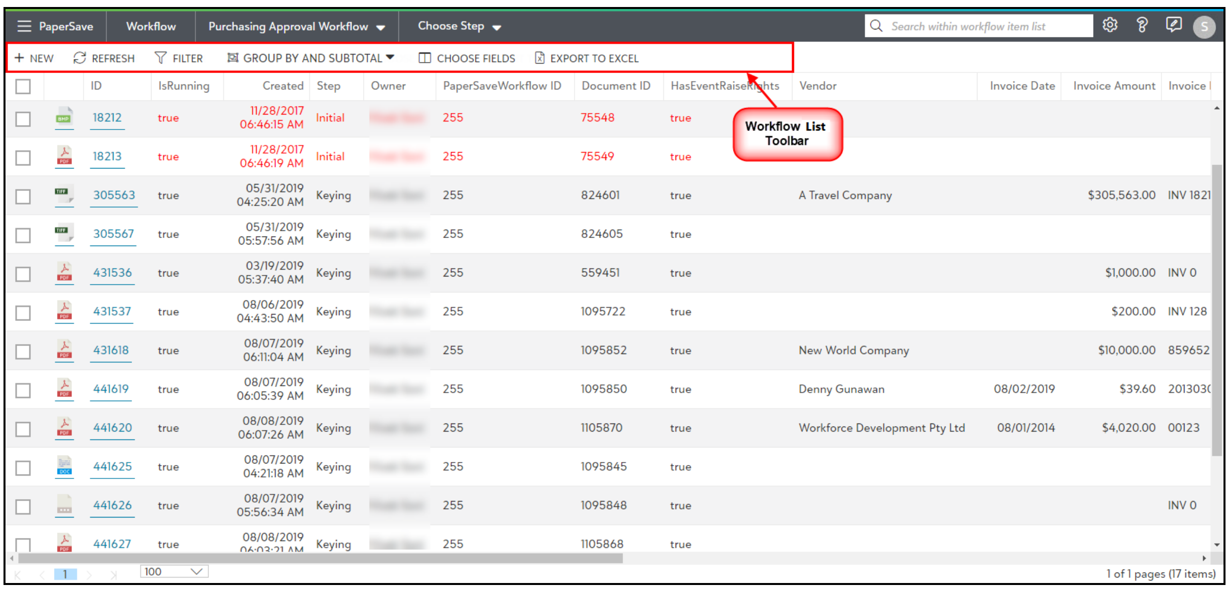
Click on the **? Help** icon for quick access to information about your PaperSave environment, the User Guide, Knowledge base articles, and the Customer portal. Click here for more details about the ? Help menu options.

6) **User Profile**

You can access the current user related information in User Profile. Click here for more details.

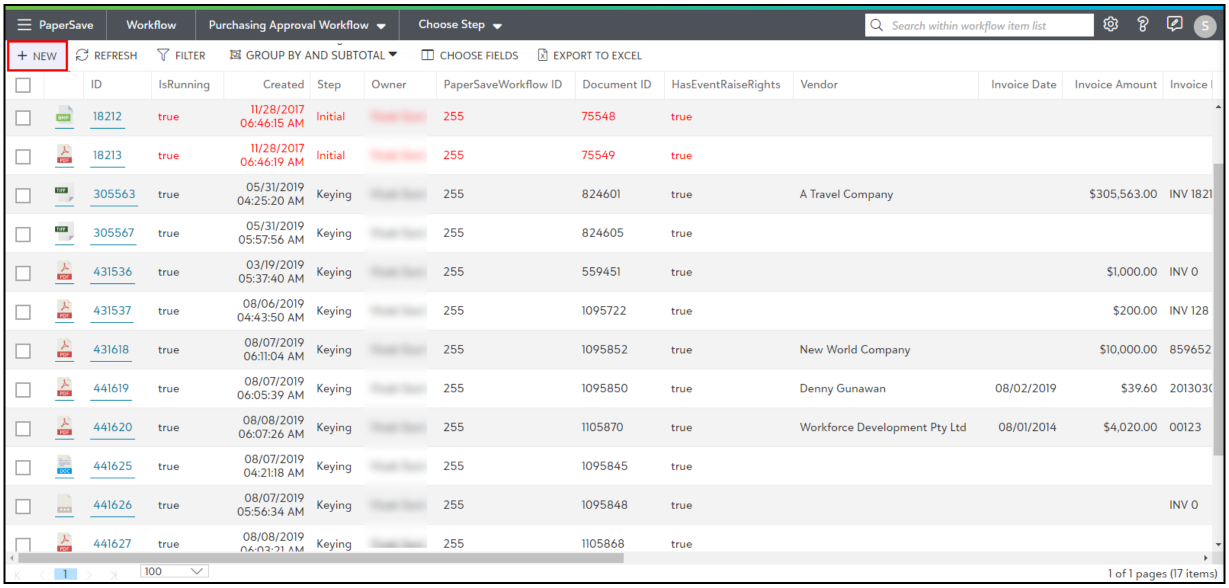
List toolbar options in Workflow item list

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

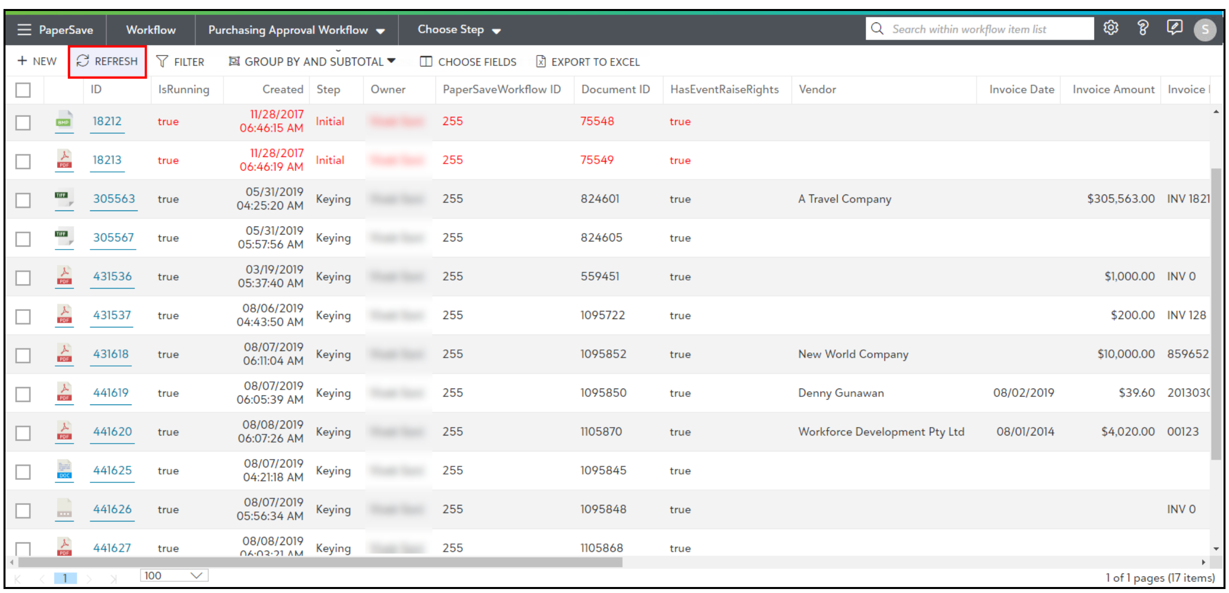


The following is the description of options available in the Workflow item list toolbar:

- **+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.



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



- **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.

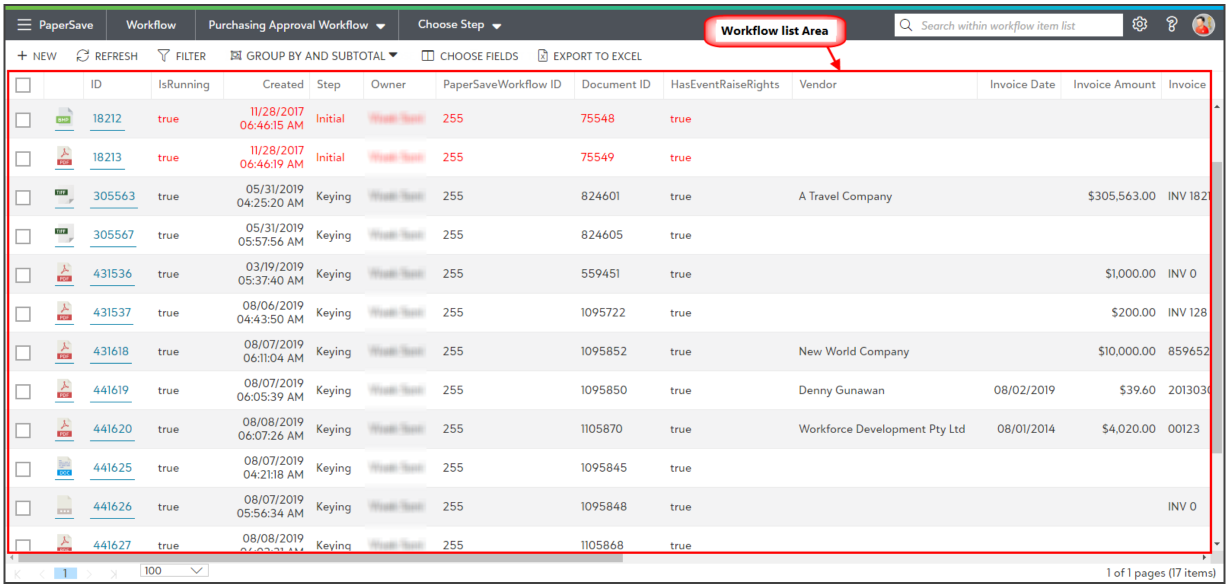
- **CHOOSE FIELDS**: You can set desired preferences to manage what information to be displayed in the current list by adding or removing columns using Choose Fields. Learn more about Choose Fields.

- **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.



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.

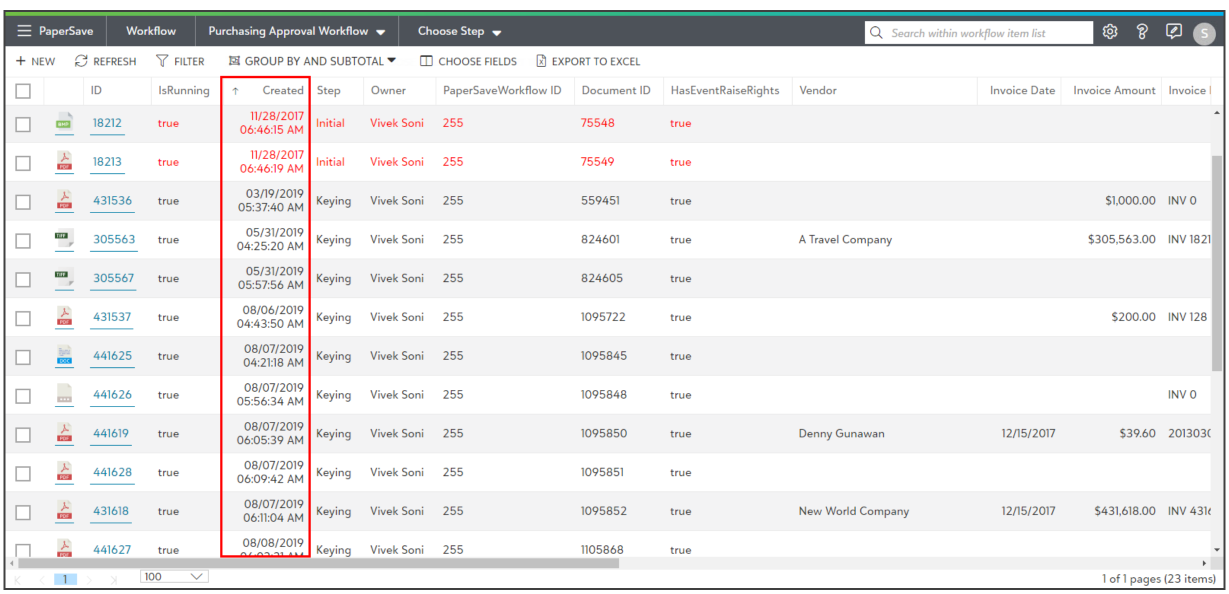
Tip: Workflow user permissions can be managed from PaperSave Configuration Area.

Sorting the Workflow item list

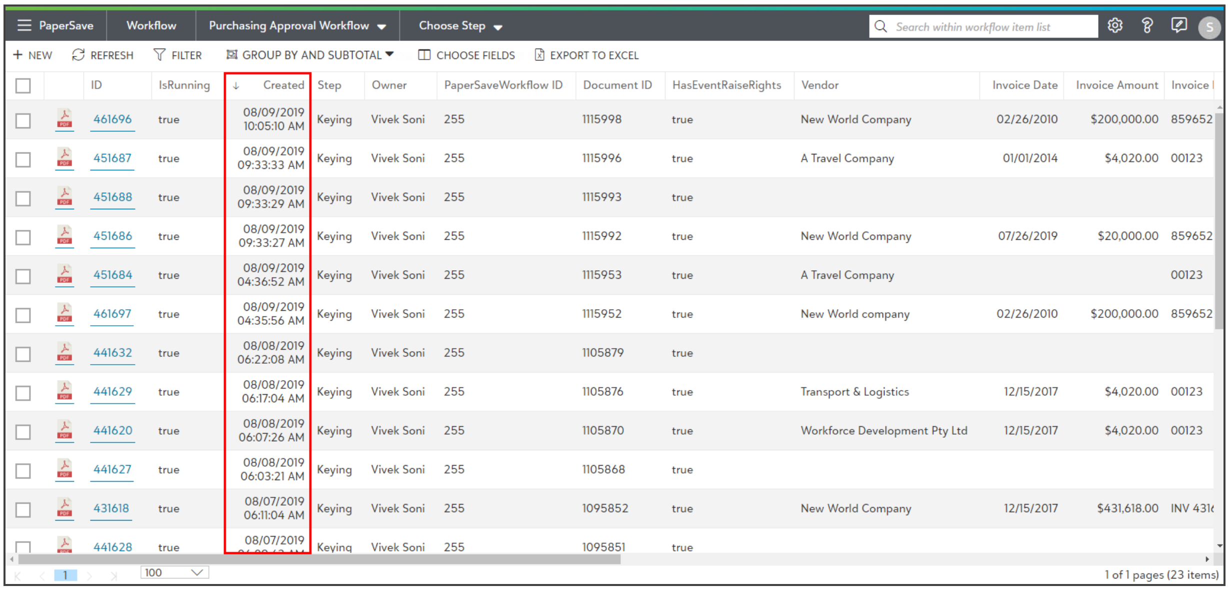
You can sort the items in the Workflow item list by clicking on any column header to sort the item list in ascending or descending order by that field.

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.



- 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.



- 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.

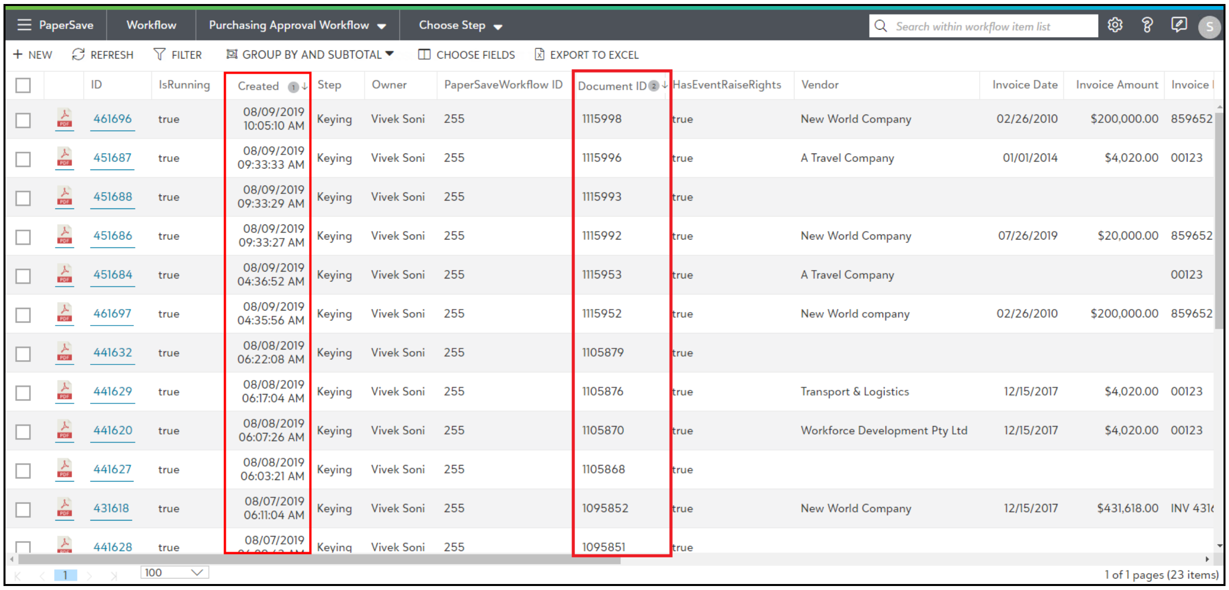
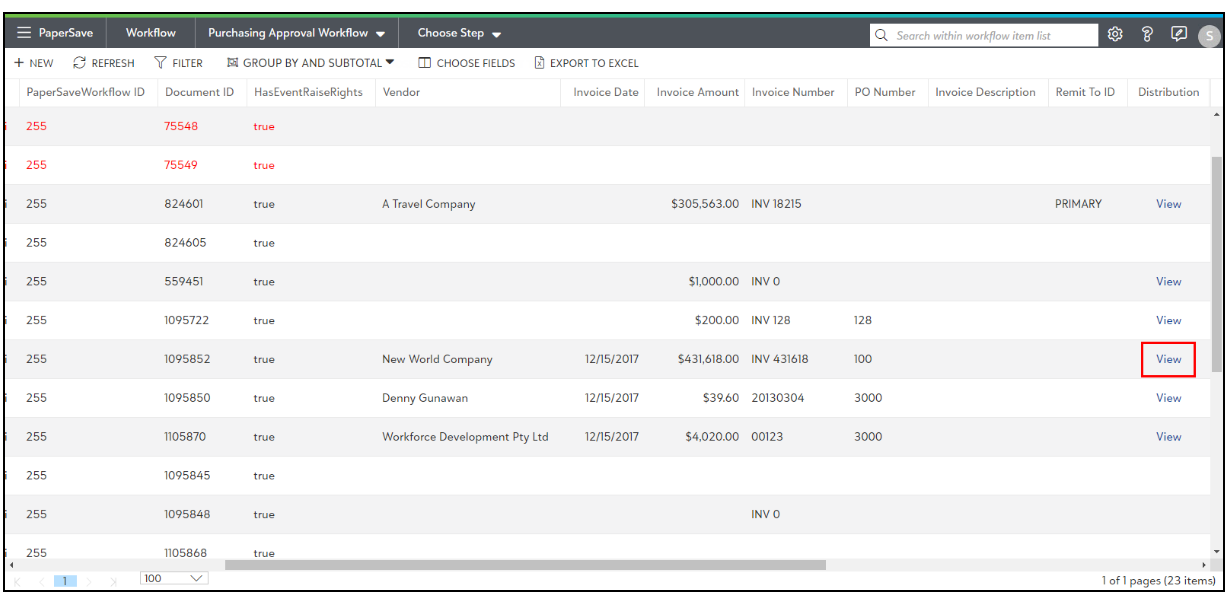
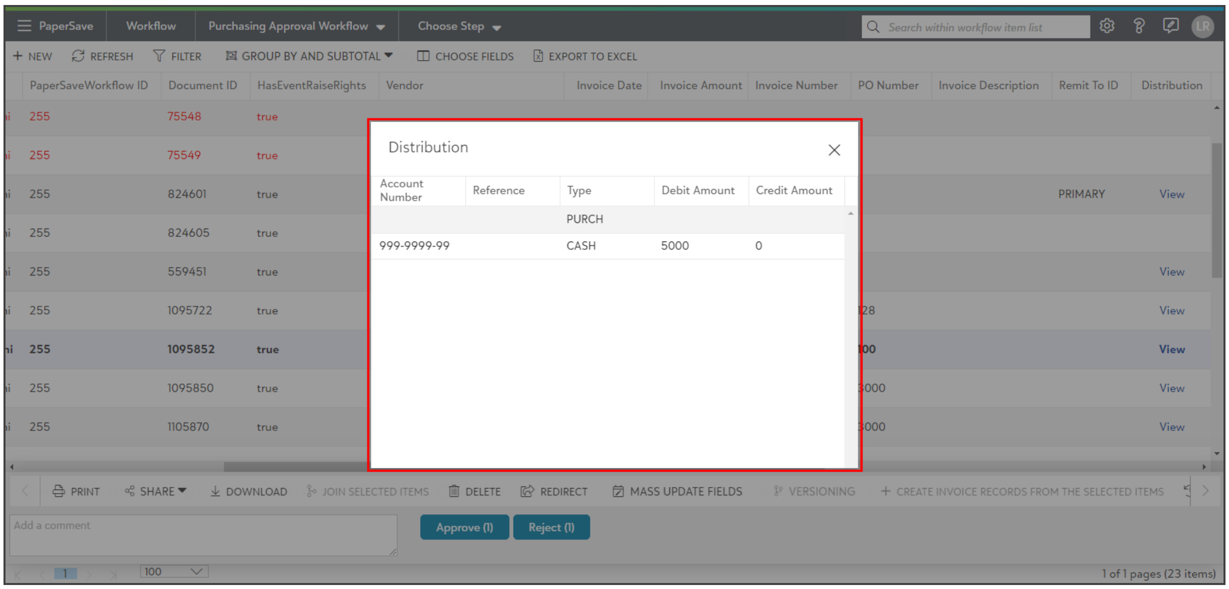


Table type field column

Table type fields allow you to set fields values in a table format. You can define the number of rows and columns in the table along with their values. The table type field values will be displayed as a hyperlink labled value titled "**View**", as shown in the below image.



- 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.

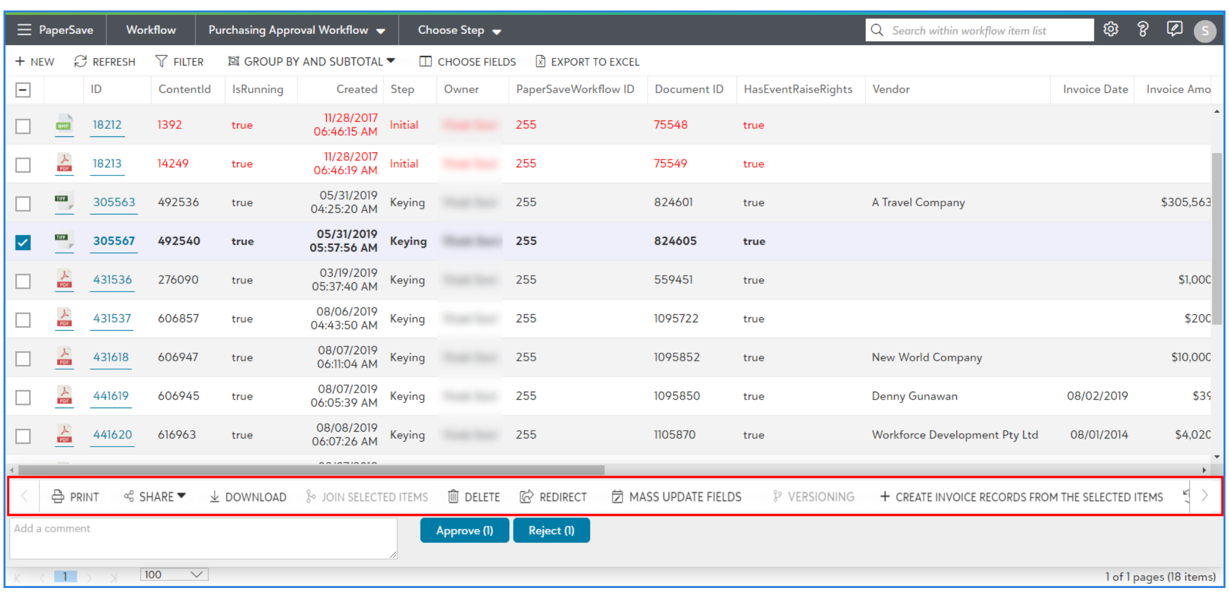
> **Note:** The Workflow event panel will appear only if you are the current Workflow item's owner or are the Workflow Super Administrator.

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.

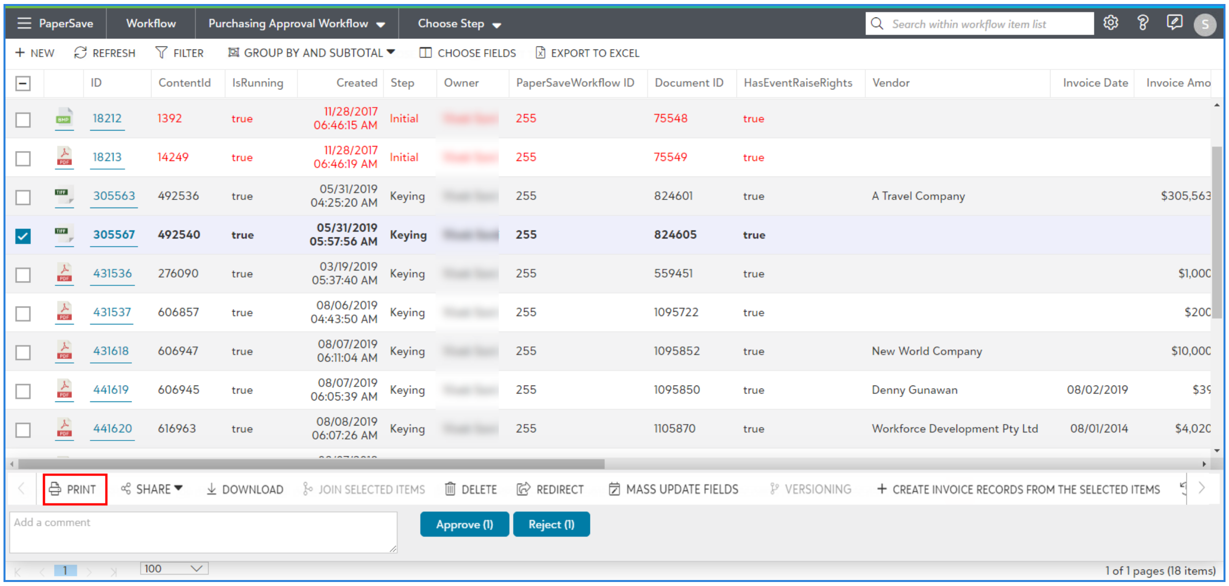
Slide-up panel in Workflow item list

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 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

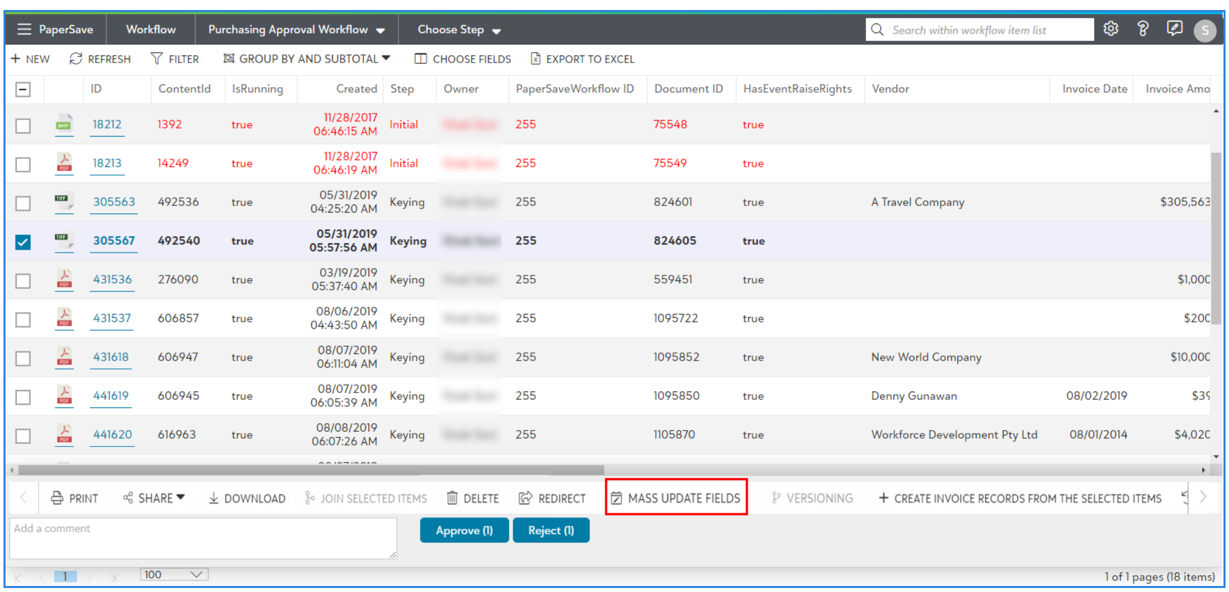
- **DOWNLOAD:** You can download the selected documents from the list. Learn more about the Download option.

- **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.

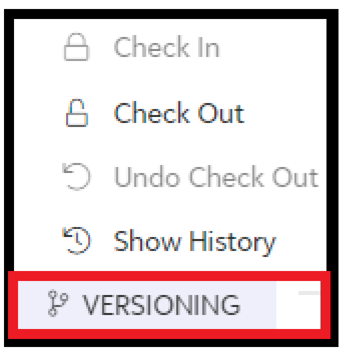
- **REDIRECT**: You can move the Workflow items to another Workflow or change the step or change ownership. Learn more about Redirect option.

- **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.



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:

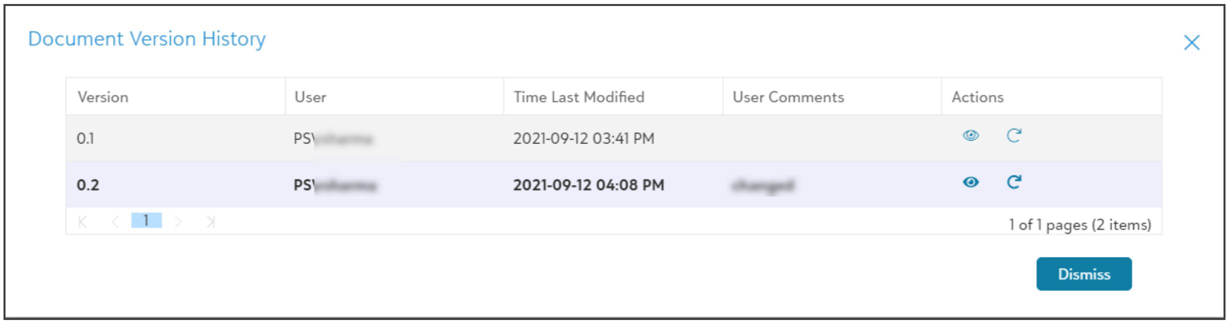
- **Check In** : This option is used to save the changes made to the selected document. You can check-in only those documents that are checked-out or are checked-in for the first time after being added. Clicking **Check In** button will open a window where you need to select version type with which you 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.

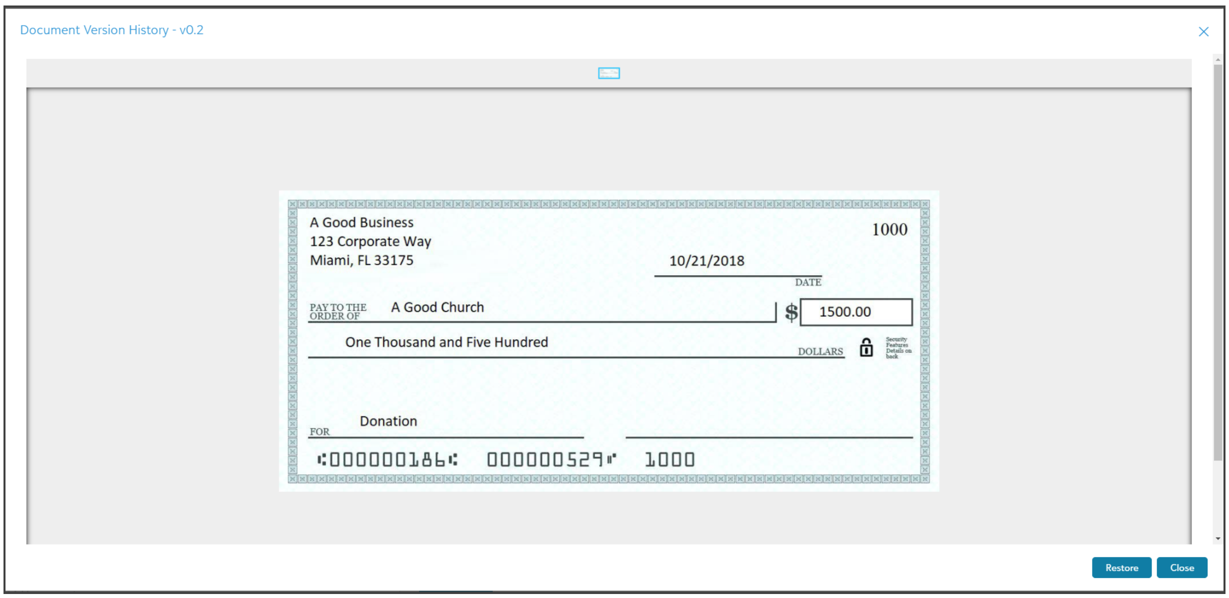
- **Undo Check Out**: This option will undo all the changes made to the document after the latest check-out was made to the document and revert back to the prior version of the document.

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

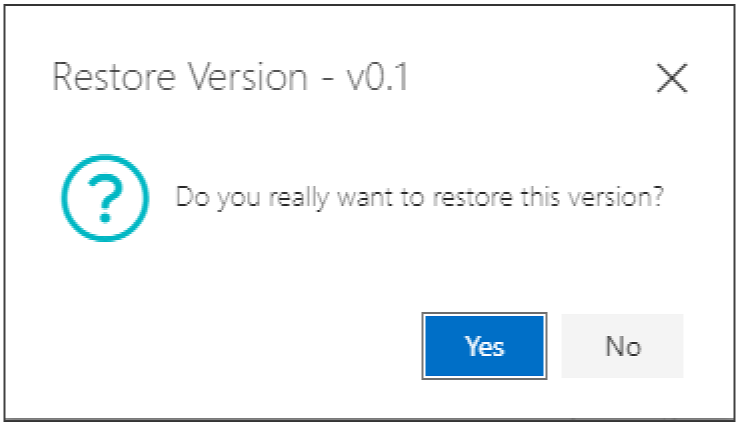
- **Show History**: This option will display the history of check-in operations made to the selected document. You will see check in details like Version of the document, Name of the User who checked in and Last modification time. You can also view the document by clicking View. You can click on**Restore**,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

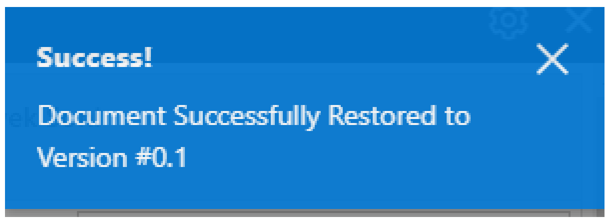


You can click on **Restore** as shown below if you wish to revert back to the selected version of the document.



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.



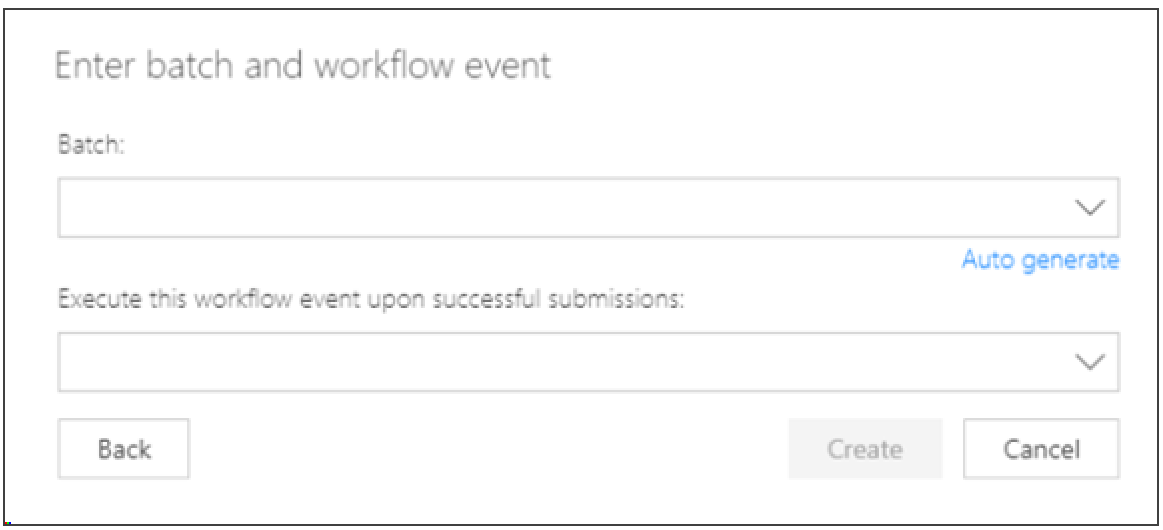


- **+CREATE ________ RECORDS FROM THE SELECTED ITEMS**: This option will let you select multiple items to directly submit to Dynamics 365 Finance to create the respective record based on Workflow field values and associate the document.

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

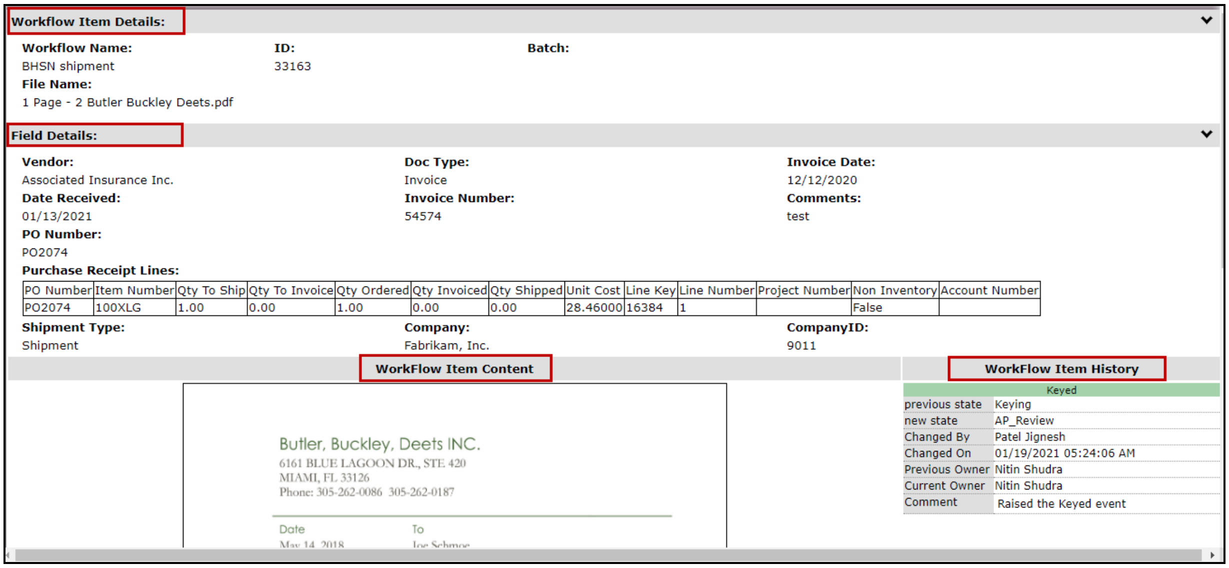
a) If you choose "Item's PaperSave acquisition batch property" option, then it will prompt you to choose the Workflow event that will be executed on successful submission, as shown below.

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.



- **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.

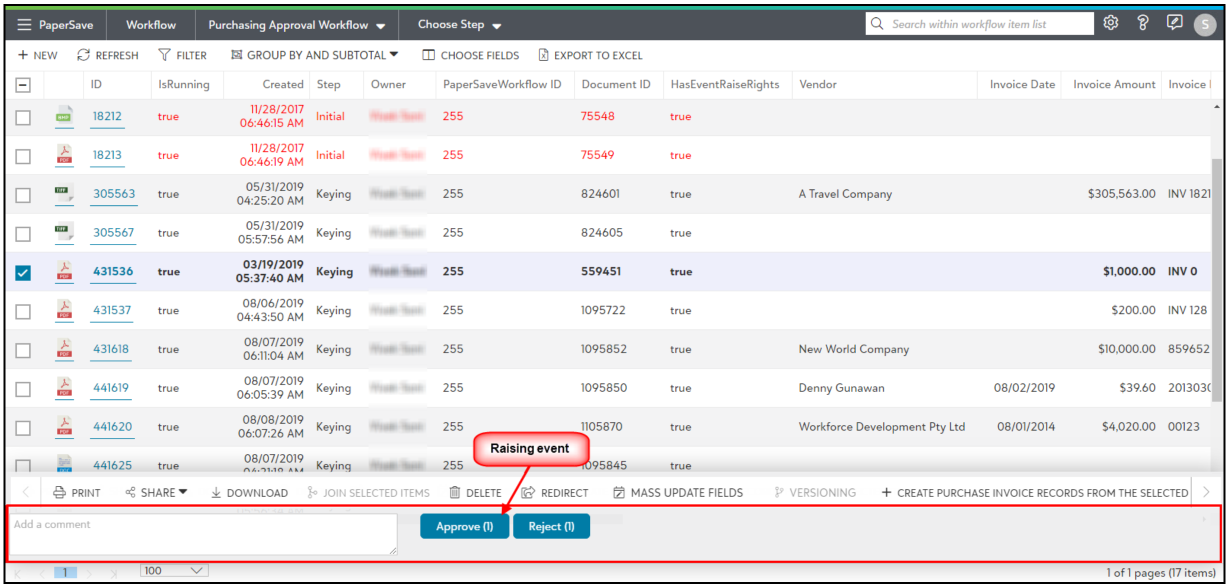


Note: When a user will download one or more Workflow items/documents from any item list or item viewer, and if the sum of file size exceeds 15 MB, then PaperSave will prompt "Download in progress" message and send an email with the download link which would be accessible only for 24 hours after the email 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.



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.

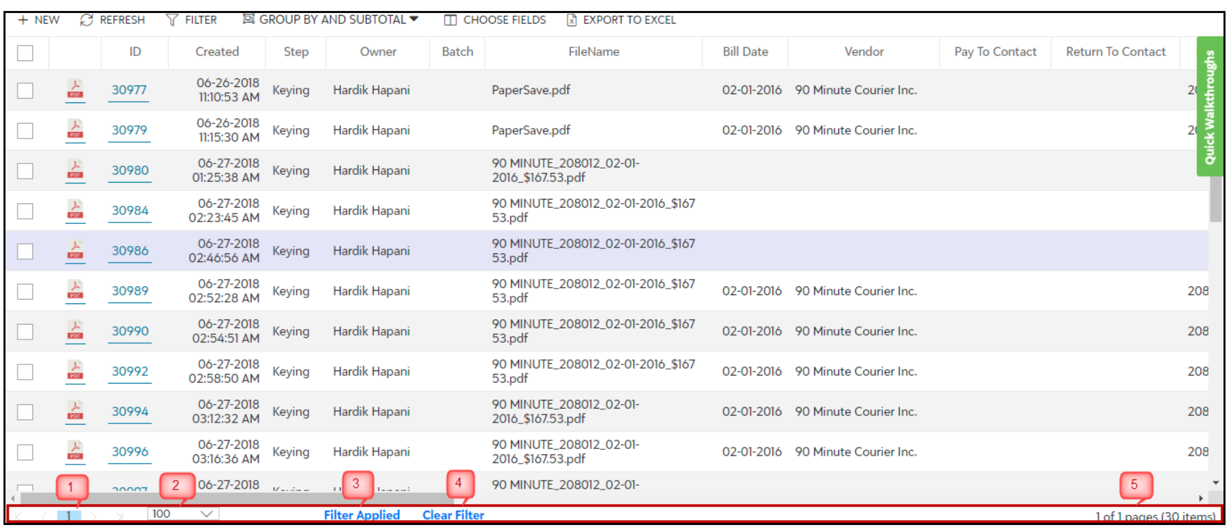
- It shall display number in the bracket representing the total number of succeeded or failed items upon raising the Workflow event.

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:



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

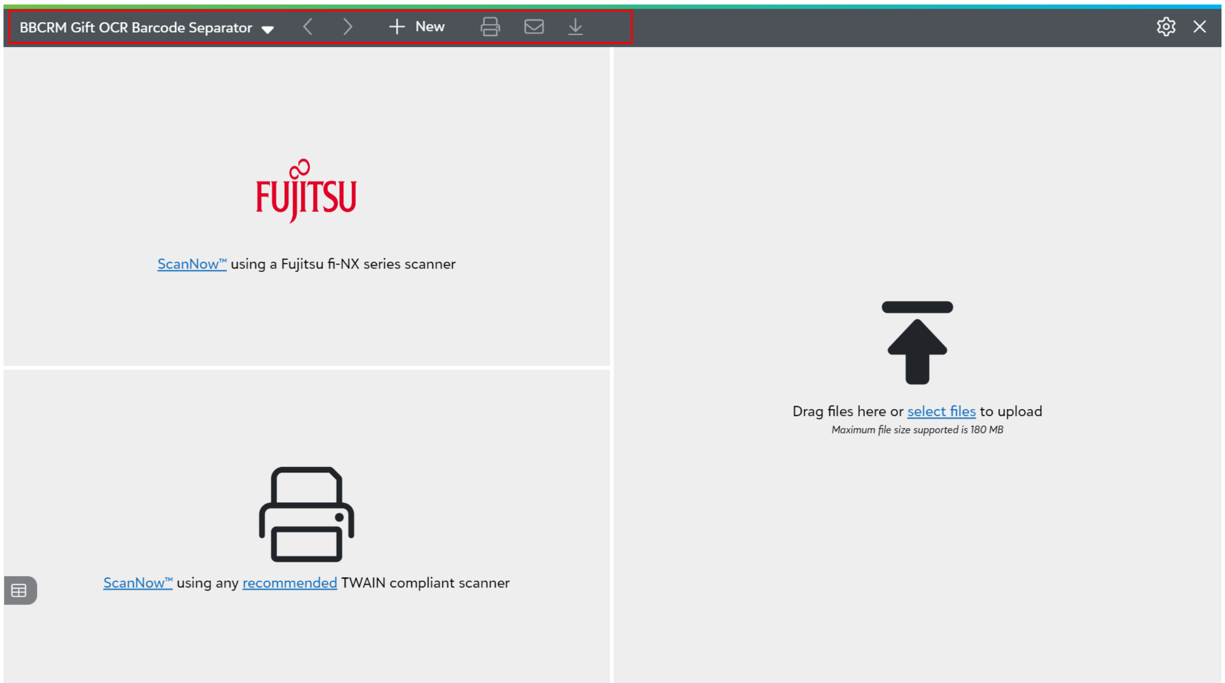
You can select any of the following file capture options to acquire the Workflow documents in PaperSave:

- 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.

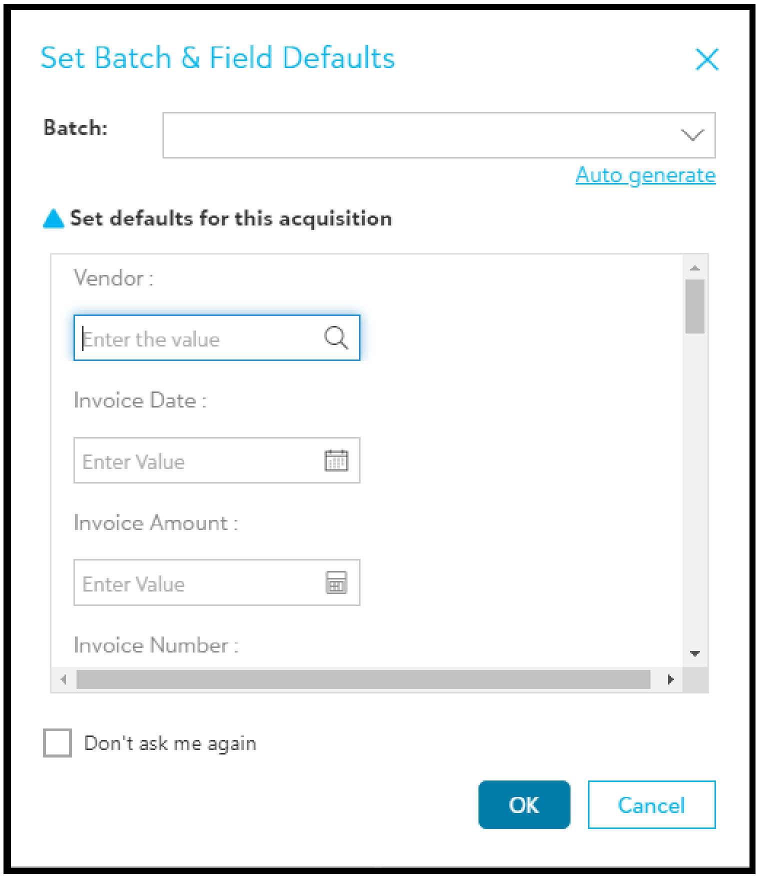
- **Email**: Click on this option to share the Workflow item as an e-mail attachment.
- **Download Content**: Click on this option to download the Workflow item.
- **Submit selected items** : Click on this option to submit the selected unsubmitted items from the slide out panel. This option gets enabled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



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, ¿, ¡
>
> French characters to be considered:
> - ë, ï, ü, à, è, ù, â, ê, î, ô, û, é, Ç

Setting defaults for this Acquisition

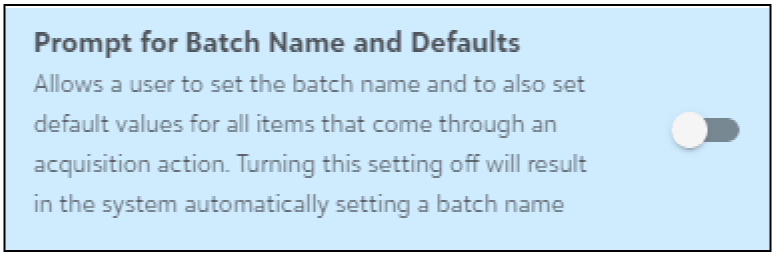
You can set default Profile field values here that will override other default values configured for the drop point, document type , and Workflow fields.

> **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.



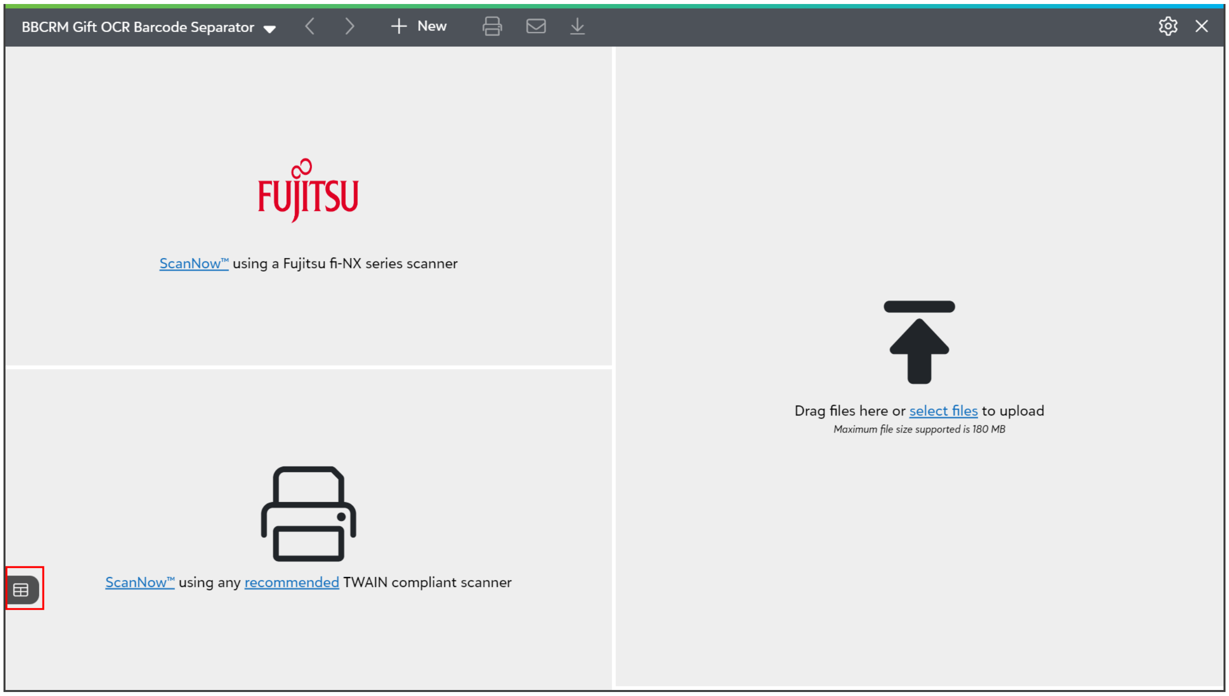
Unsubmitted Item list

Tracking acquisition status from the item list

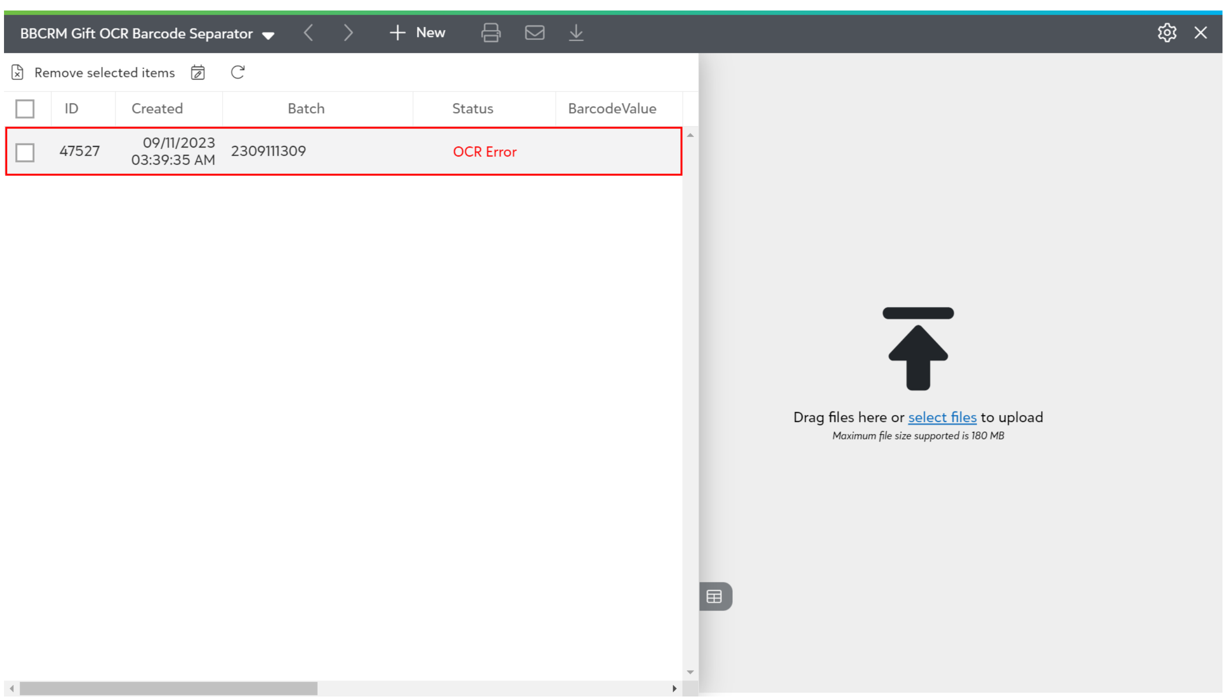
The item list slide-out panel shows the list of items that have been acquired but have not yet been submitted.

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.

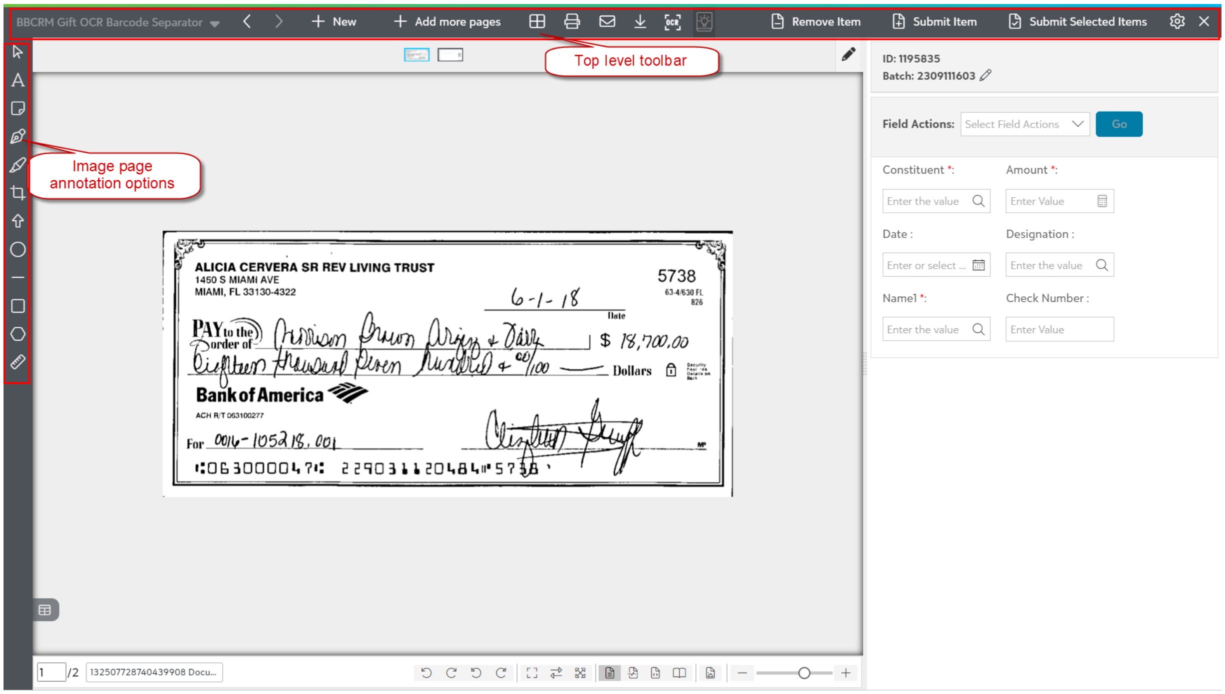
> **Note:** Click here to learn more from the video about the unsubmitted item list.

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.

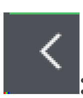
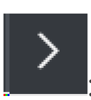
The below screen displays the various options available in the Item viewer for validating the Workflow item.



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:**

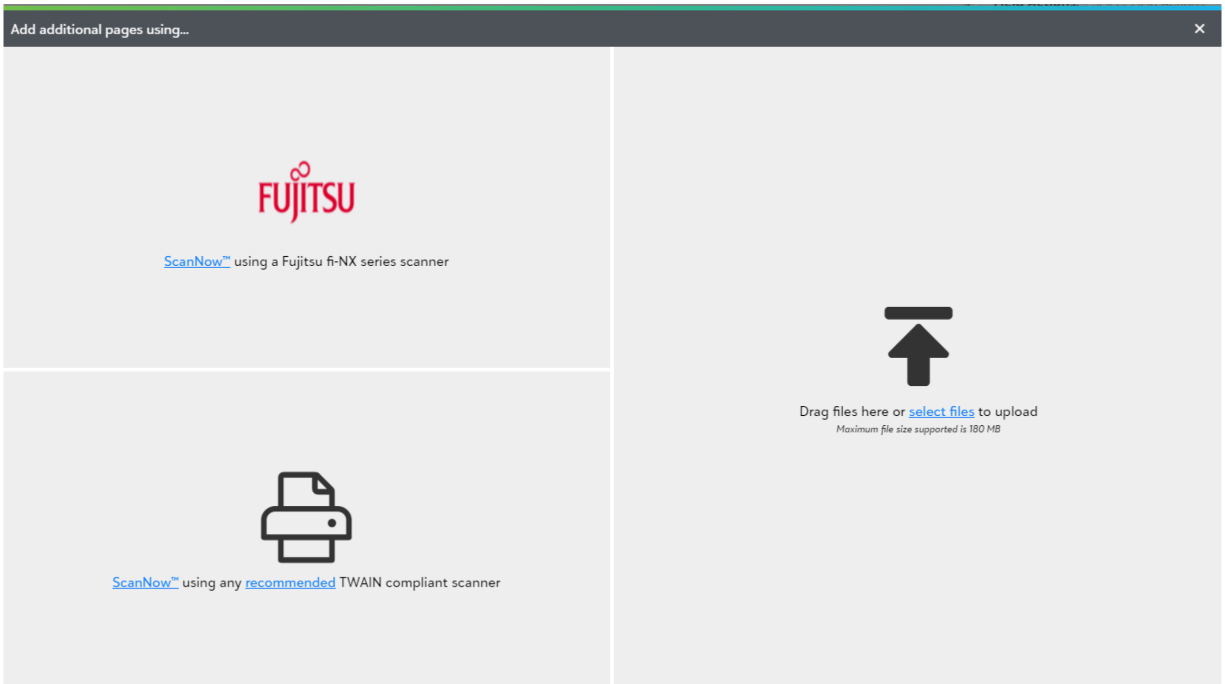
The following are the options in the top level toolbar of item viewer for unsubmitted items:

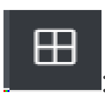
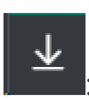
- **:** Click on this option to navigate to the previous unsubmitted item. It will be disabled if there is no previous item.
- :Click on this option to navigate to the next unsubmitted item. It will be disabled if there is no next item.
- 

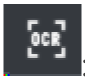
: Click on this option to switch to File capture options panel to acquire a new document.

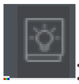
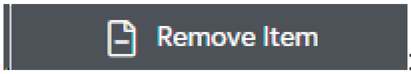
- 

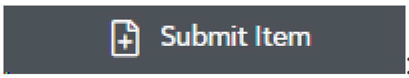
: Click on this option to add more pages to the current document. clicking on this option will display the following "Add additional pages" prompt.



- : 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.
- 

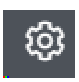
: Click on this option to discard the current item.
- 

: Click on this option to submit the current unsubmitted item.
- 

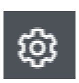
: Click on this option to submit items selected in the unsubmitted item list.

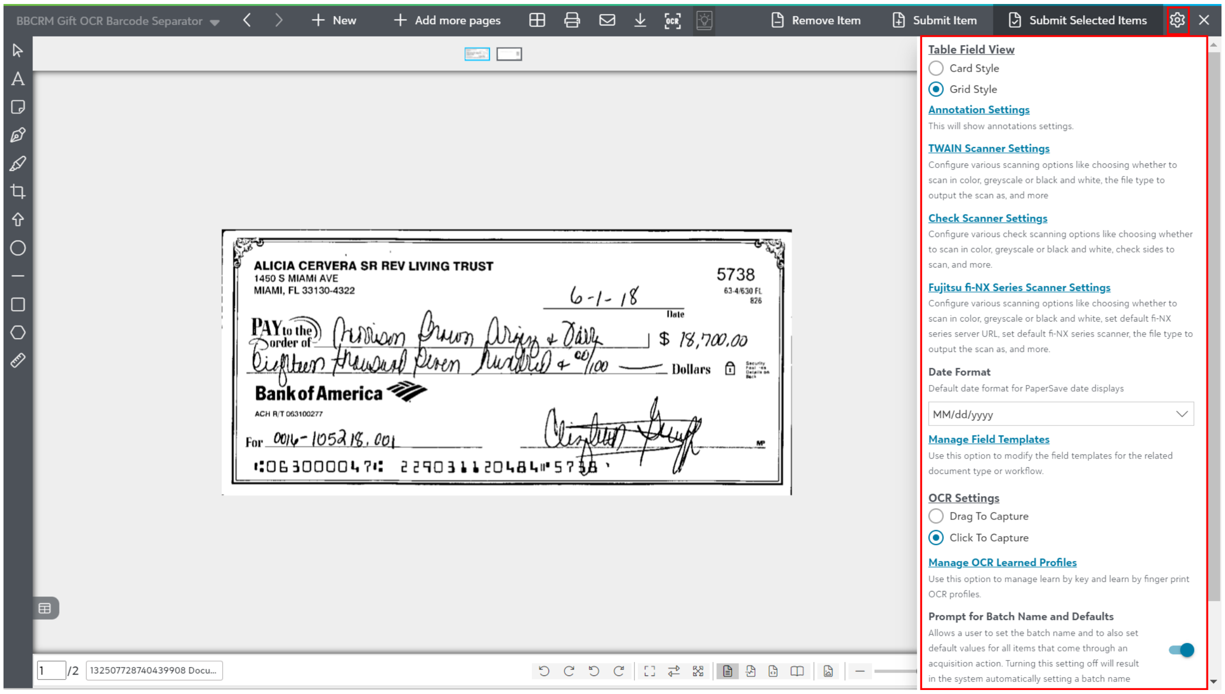
2)**Using Image page options(Annotations) for Unsubmitted items:**You can add different annotations using the Image page options toolbar on the left-hand corner of the screen. Click here to know more about it.

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:

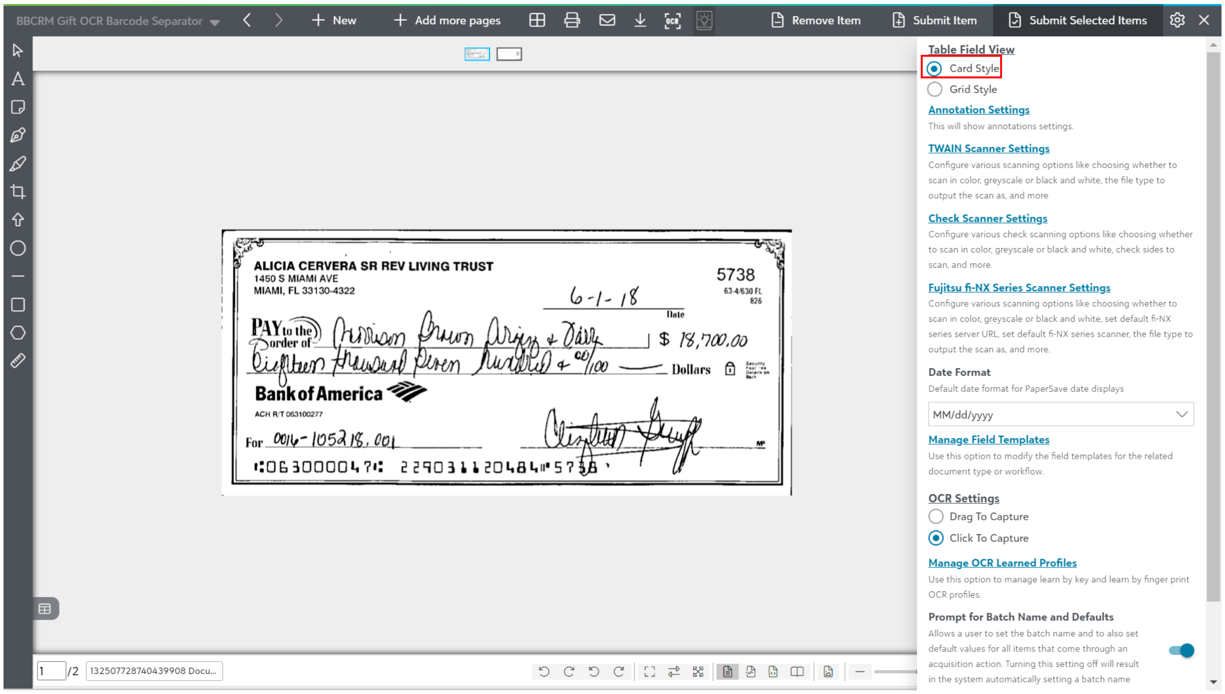


The following is the brief description of various preferences in the Settings panel:

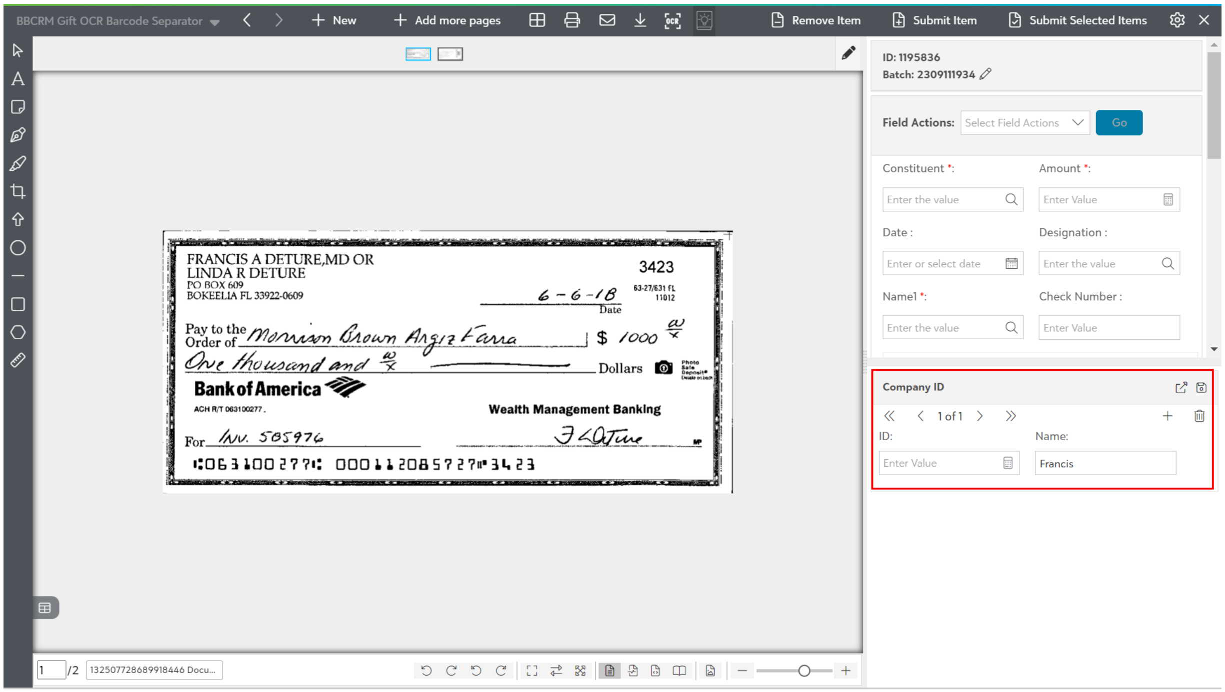
4) **Table Field View:** PaperSave offers a widget with two different user interfaces (card style and grid style) for the table type fields in the document profile field panel. Card style is set as the default option.

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:

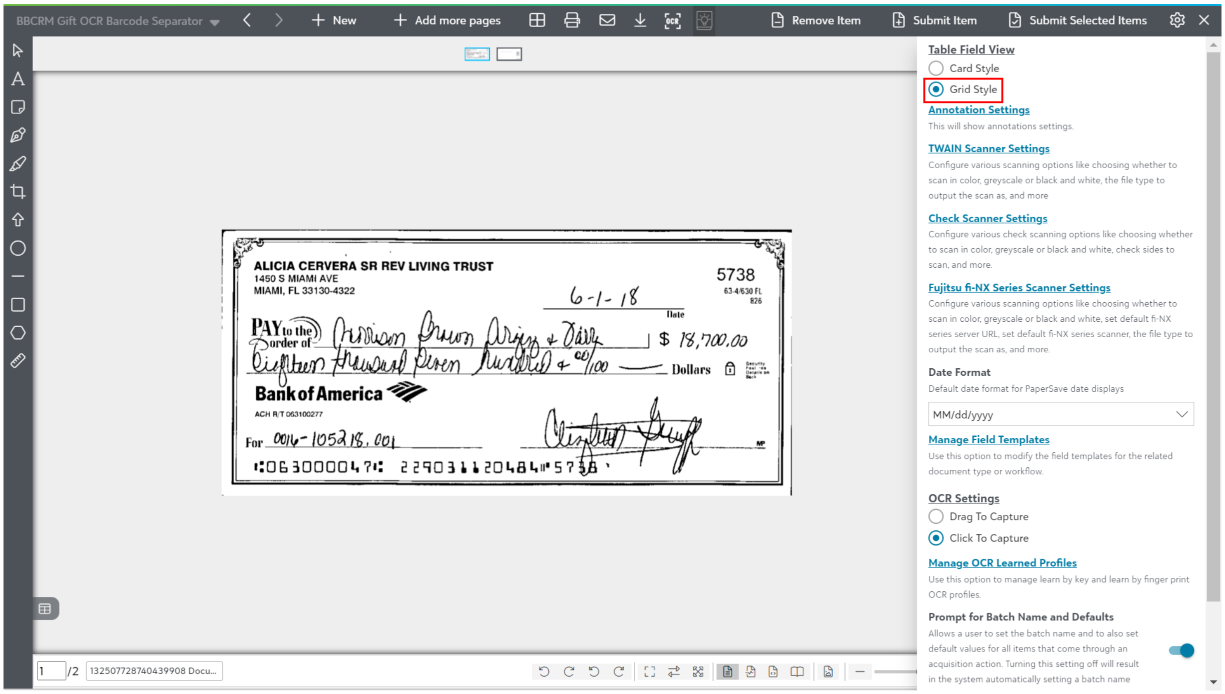


- You will see "**Card Style view**" for the Table type fields in the document profile field panel while editing the field as shown below.

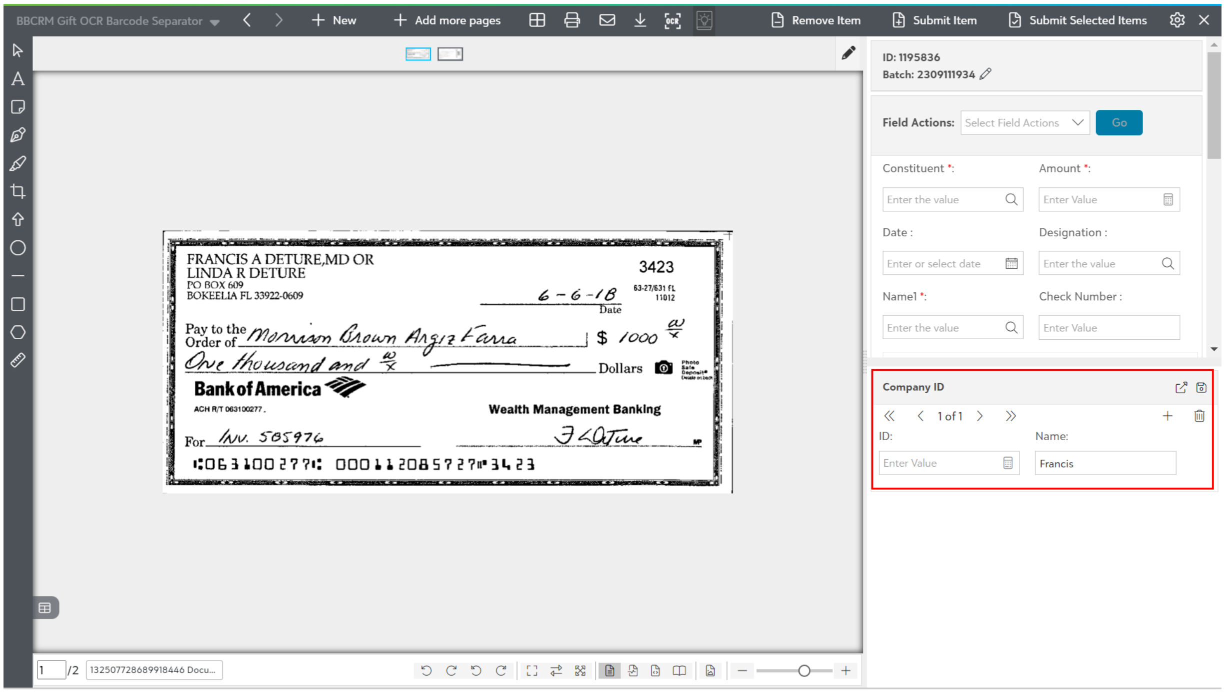


b) **Grid Style**: It switches the "table type field" widget to Grid style view.

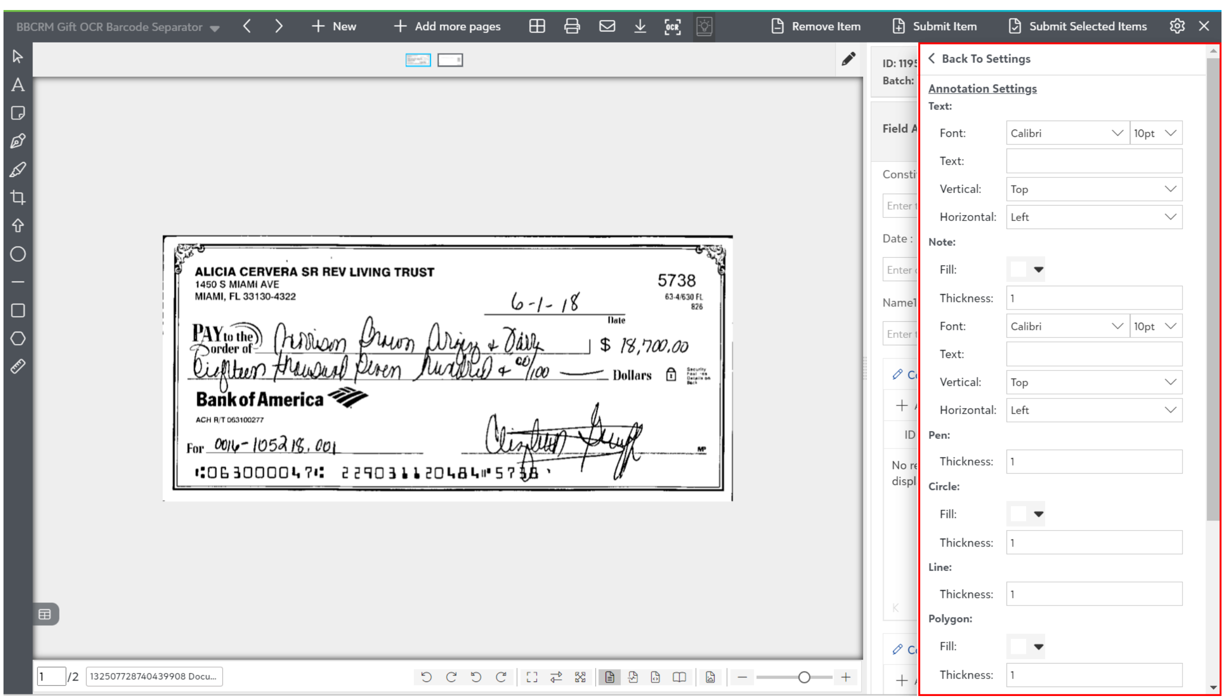
- Select the Grid style option in the Table field view Settings as shown below:



- You will see "**Grid Style view**" for the Table type fields in the document profile field panel as shown below.

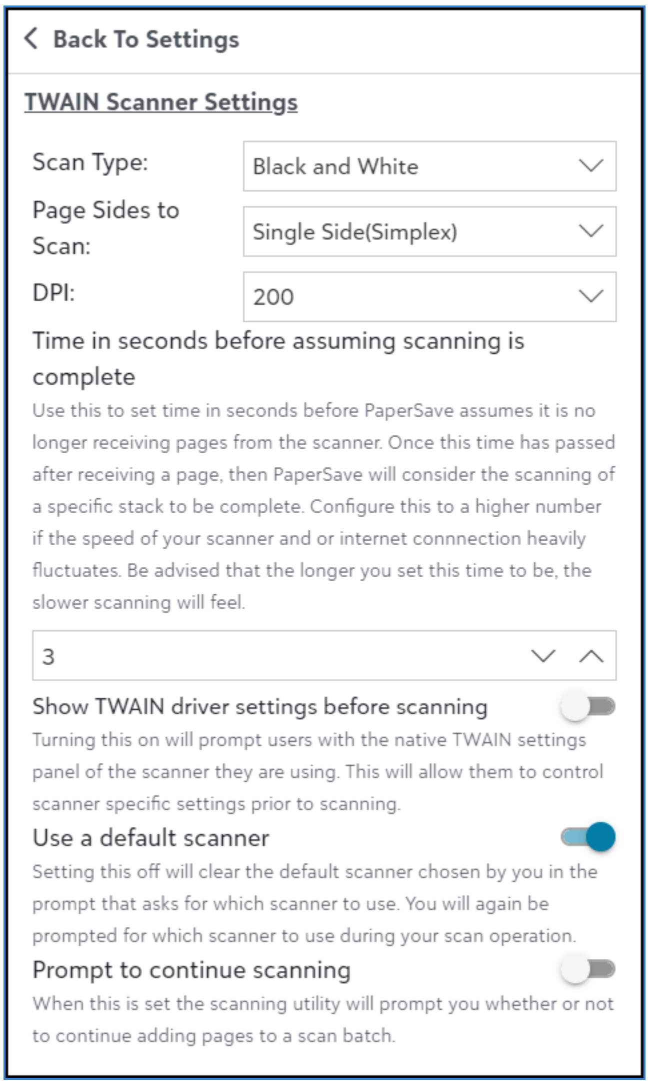


c) **Annotation Settings:** This Setting option enables you to adjust the following preferences for each annotation tool in the Workflow Item Viewer.



- **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:



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.

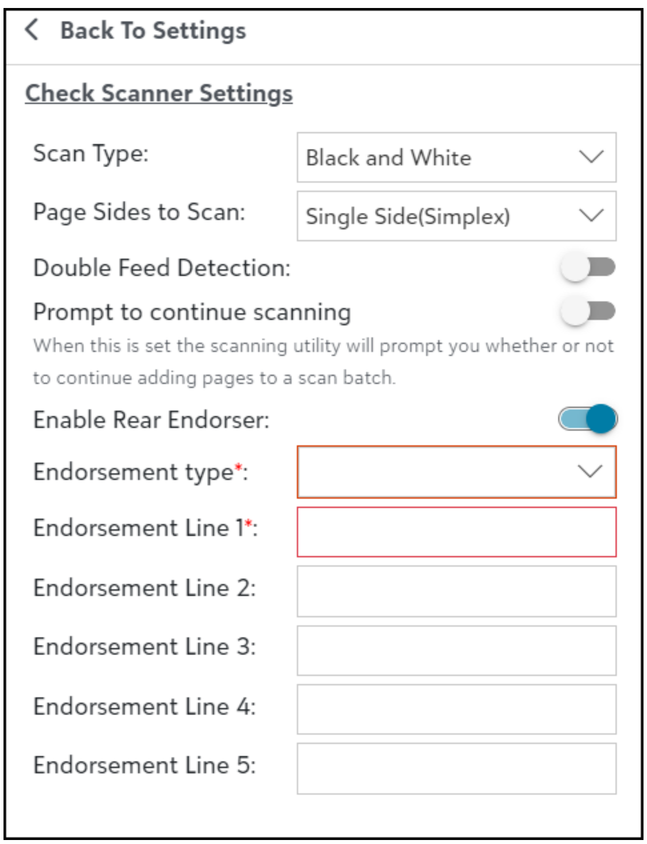
> **Note:** We recommend that you use 300 DPI.

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:



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.

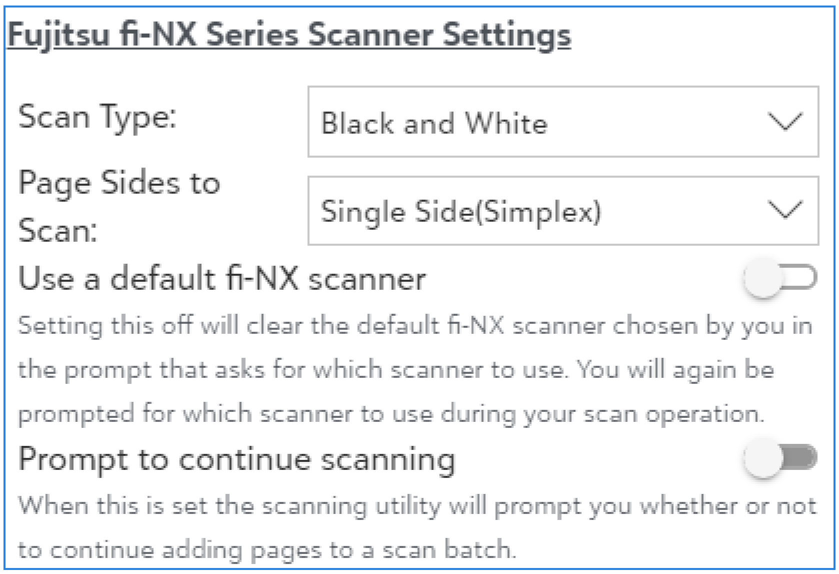
- **Enable Rear Endorser:** This option allows the user to enable and disable the rear endorsement for the checks. The endorsement can be virtual or physical, depending on your check scanner.

- **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:



- **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.

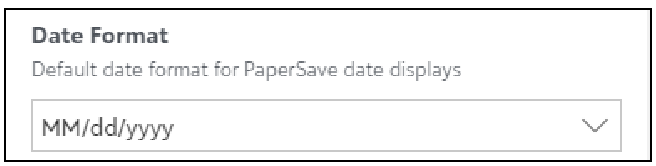
- **Page Sides to Scan**
  - Single Side
  - Both sides

> **Note:** We recommend etting 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.



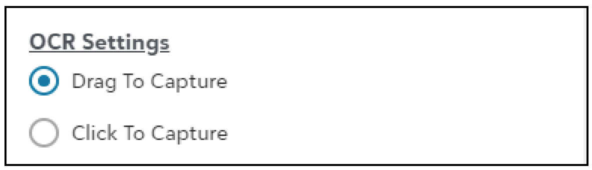
You can define the desired preferences to any of the following date format options.

- 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.

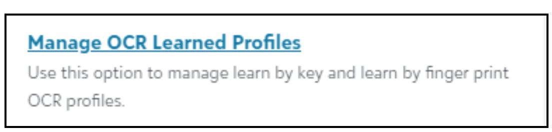
11) **OCR Settings**: This Setting option enables you to configure OCR-related preferences in the Workflow item viewer, as follows. Set the preference to use the drag or click action to correct the profile fields values on items processed by OCR.



- **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.

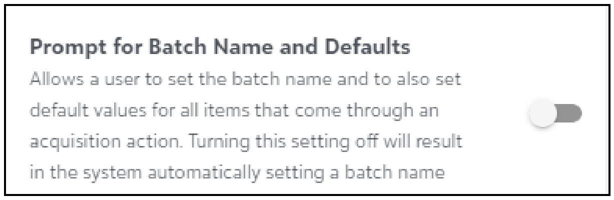
> **Note:** The Click/Drag to Capture options will only be applicable for documents processed by OCR.

12) **Manage OCR Learned Profiles:** You can use this option to manage the OCR learn by key and learn by finger print OCR profiles.

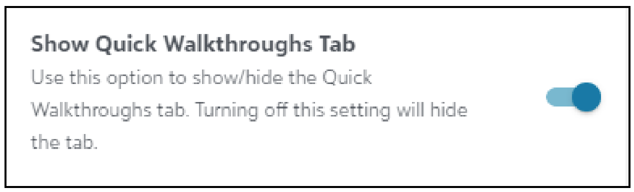


13) **Prompts for Batch Name and Defaults:** Enabling this option turns on the prompt for batch and field defaults. The prompt is on by default but can be turned off by selecting the checkbox labeled "**Don't ask me**

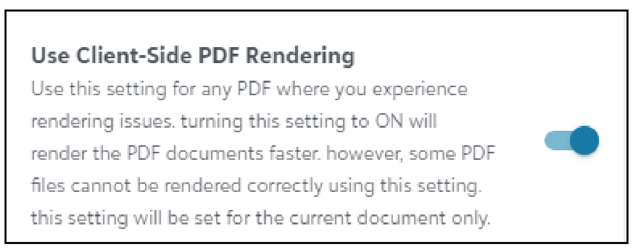
again" in the "**Set Batch and Field Defaults**" dialog. Turning this setting off will result in the system automatically setting a batch name. Similarly, Setting the option **ON** restores the prompt.



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:

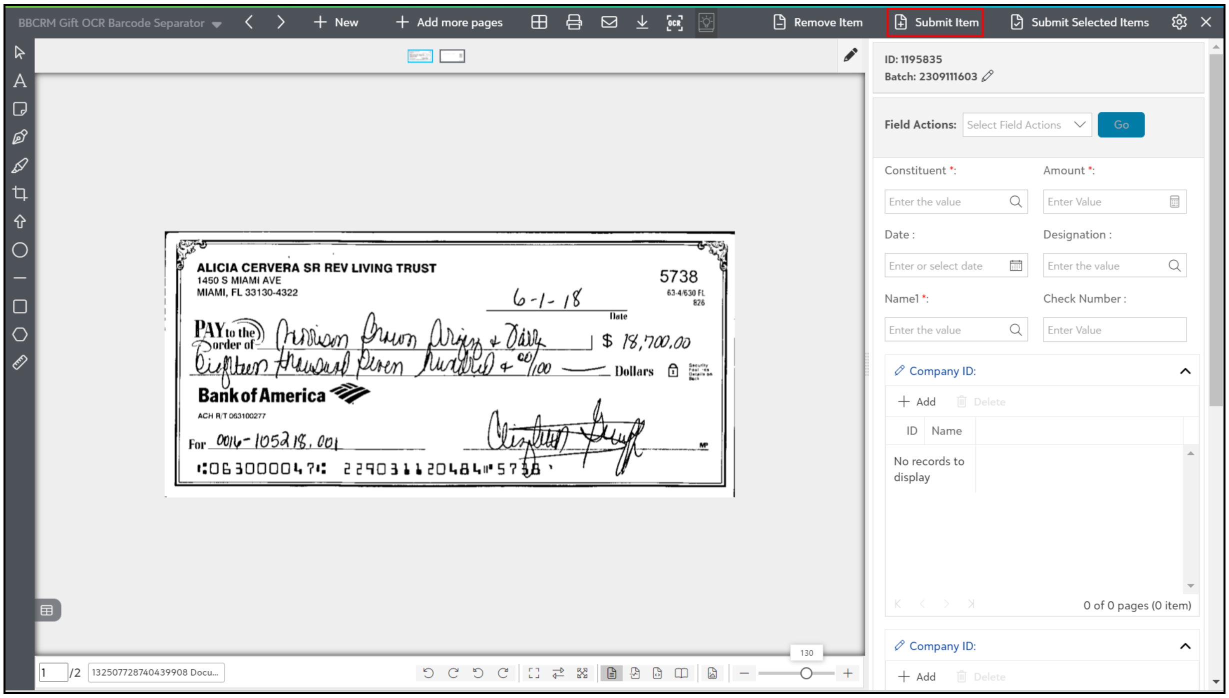
Watch the video to learn how you can submit an item to the Workflow.

You can submit items to Workflow in the Workflow Area upon validating the profile fields using any of the following options:

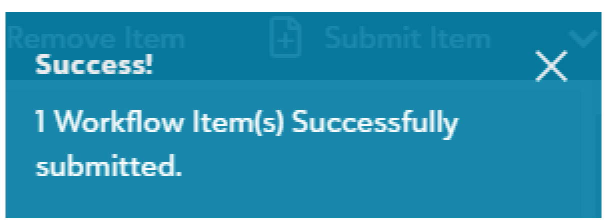
- Submit current item in the item viewer using **Submit item**.
- Submit one or more Workflow item from the unsubmitted item list using **Submit Selected items**.

1) Submit item

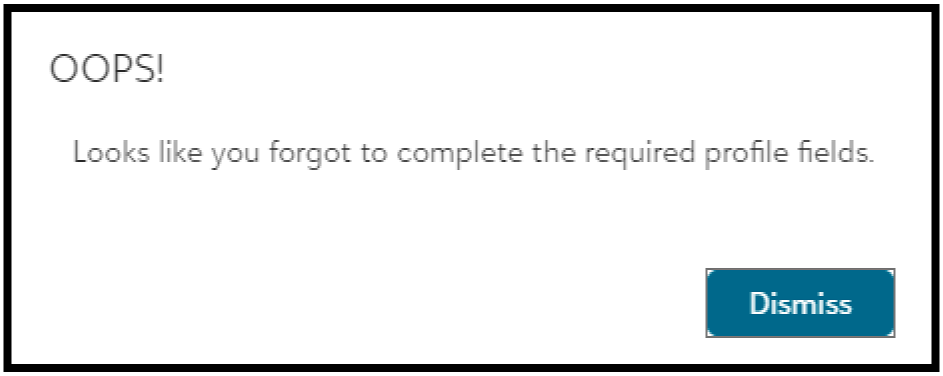
Once you are done validating the profile fields and you have entered the required fields, then click on the**Submit Item** in the Top level toolbar (as shown in the below screen).



- It shows a success notification in the top right corner of the screen upon successful item submission as shown below:

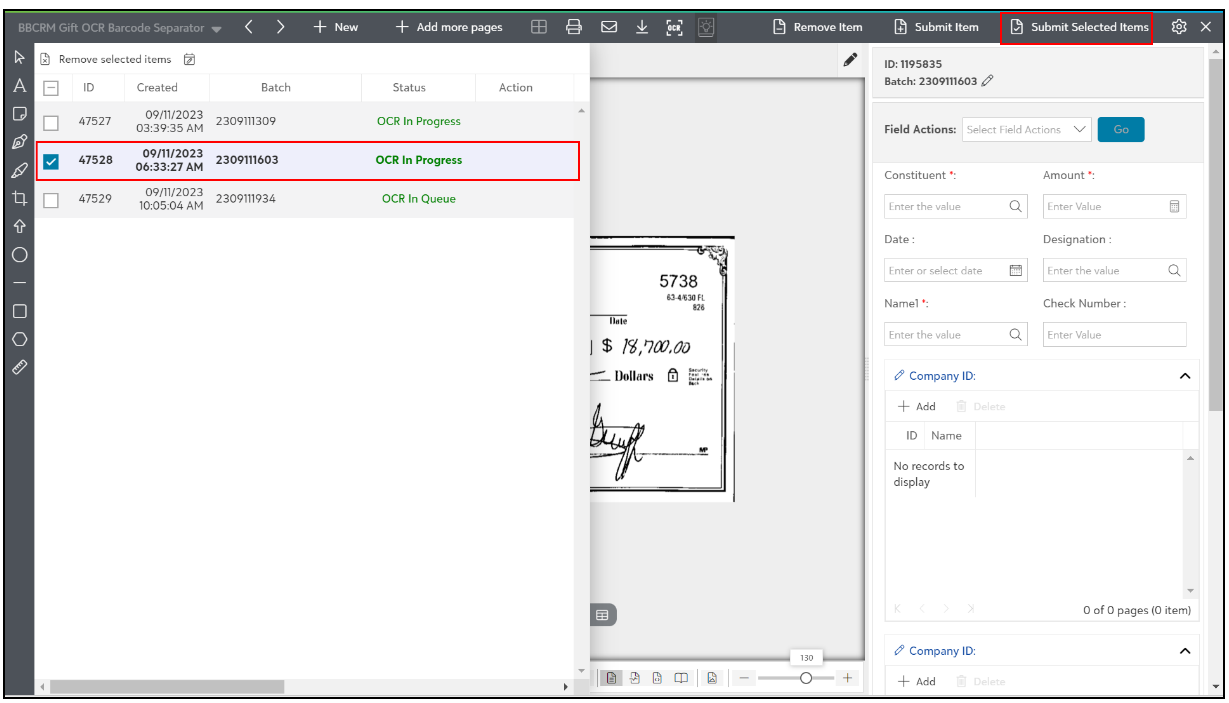


- If you try to submit a single item without entering the required fields, you will encounter the following error:



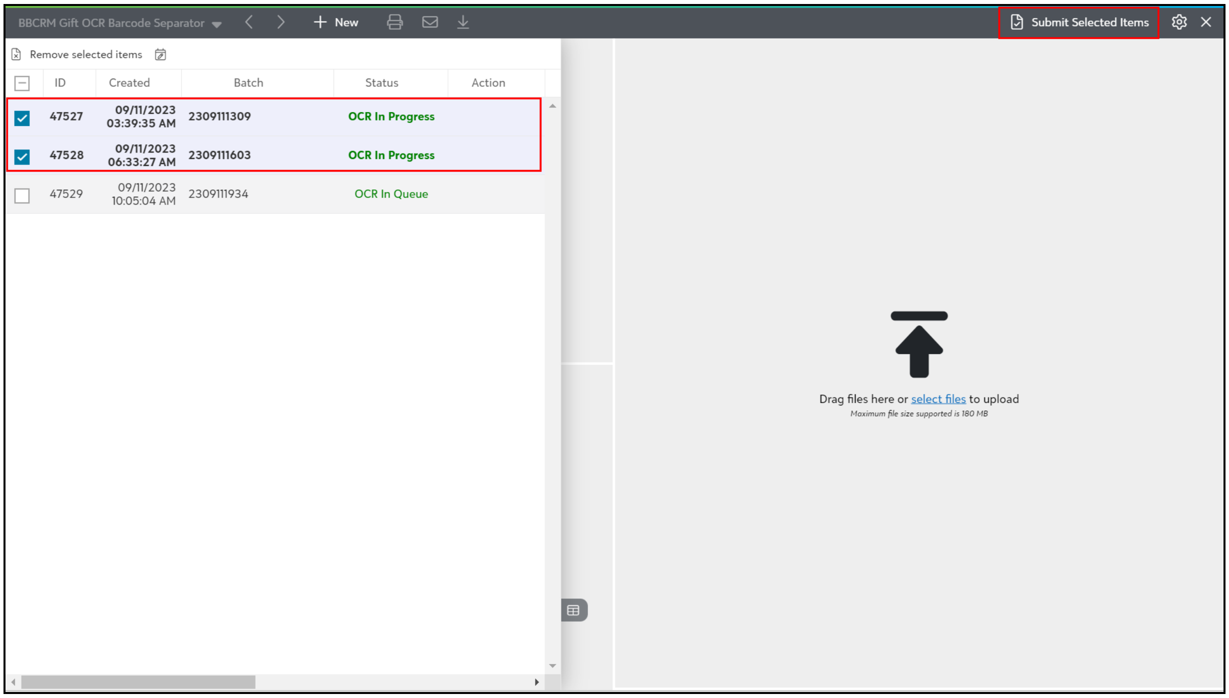
2) **Submit Selected Items:**

- 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.

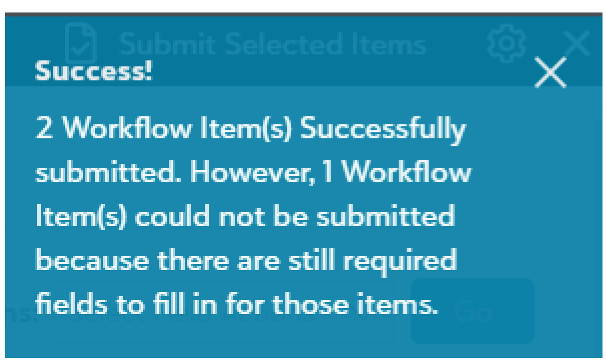


- Select the multiple items from the unsubmitted item list that you wish to submit.

- 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

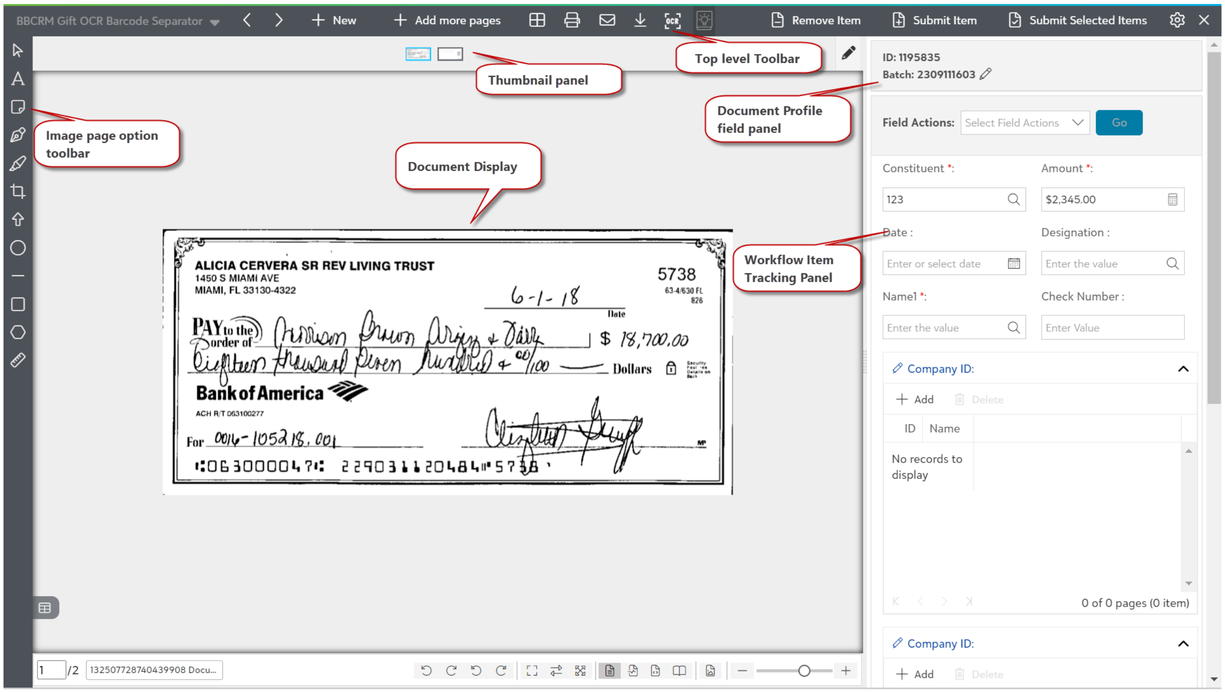
This section covers the various options that PaperSave Workflow Area provides for viewing a Workflow item. Workflow users can access the desired Workflow items to perform various operations such as editing the profile fields, adding annotations, adding more pages etc.

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 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.

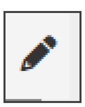
> **Note:** You can view and delete learned profiles from the **Manage OCR Learned Profiles** section of the settings panel.

- 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 turn s 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

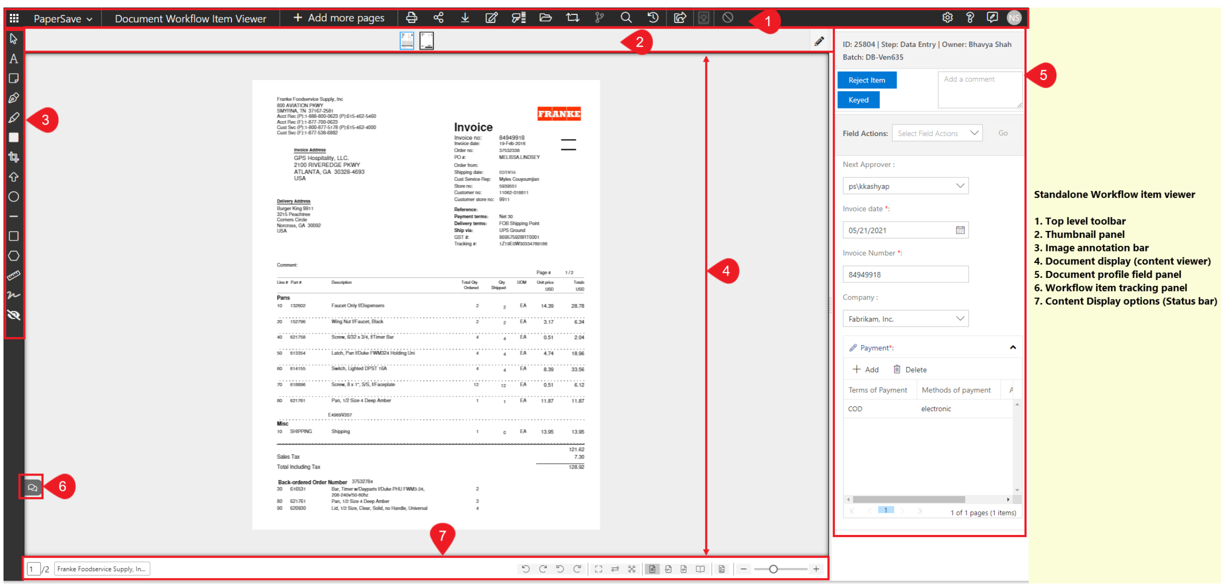
The status bar at the bottom of the embedded Workflow item viewer enables you to adjust display related settings such as fit width, fit to size, single page display, horizontal display, etc. Click here for more details.

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

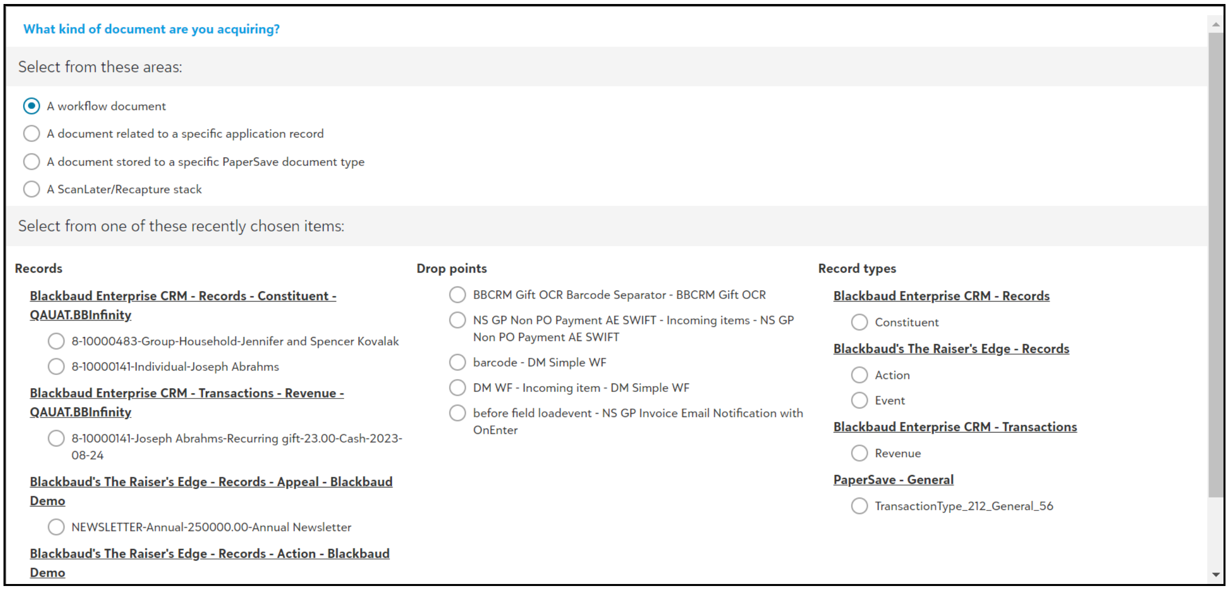
This guide contains details on all the functions and uses of the Acquire Area. It is organized into sections that deeply describe options available around each major function in the Acquire Area.

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:



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* for more information on this Product.

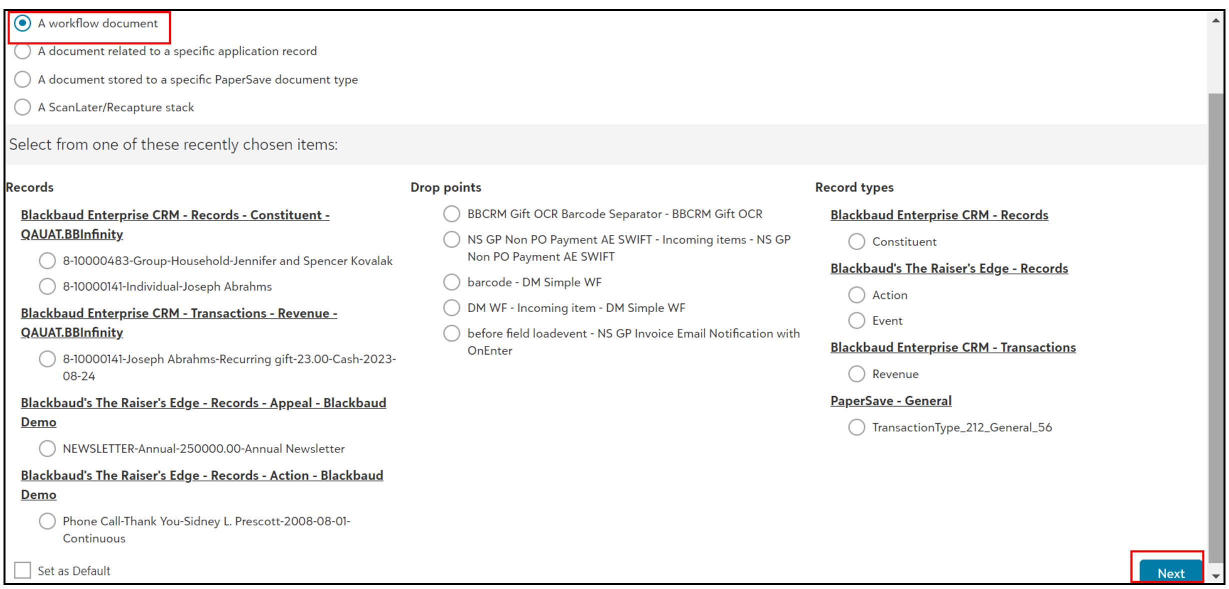
- **Select from one of these recently chosen items**: Select this option to continue adding documents to recently acquired documents.

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

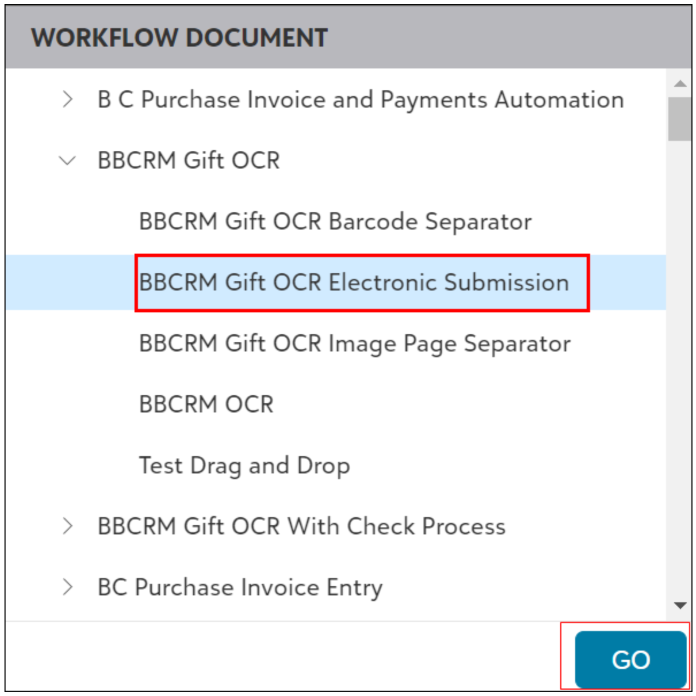
1) Select **A Workflow document** in the type of document you want to acquire menu and click on the **Next** button in the lower right corner.



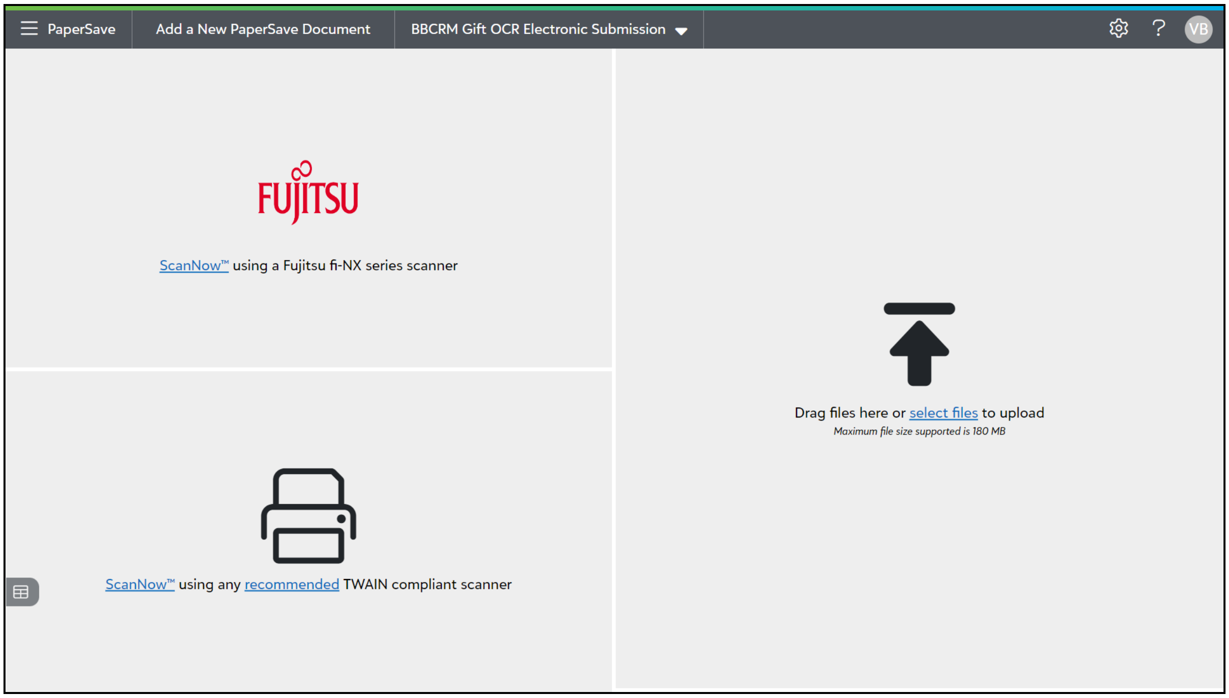
Select a Workflow Drop point

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.



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

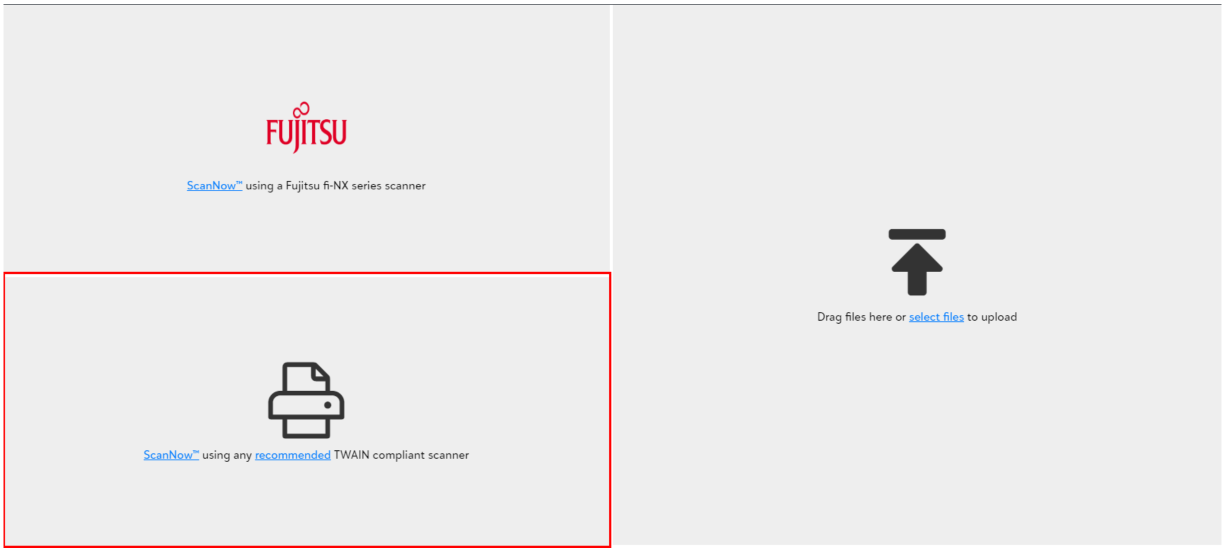
Watch the video to learn about the Settings in the file capture options panel in Acquire Area.

Watch the video to learn about the Unsubmitted item list in the Acquire Area.

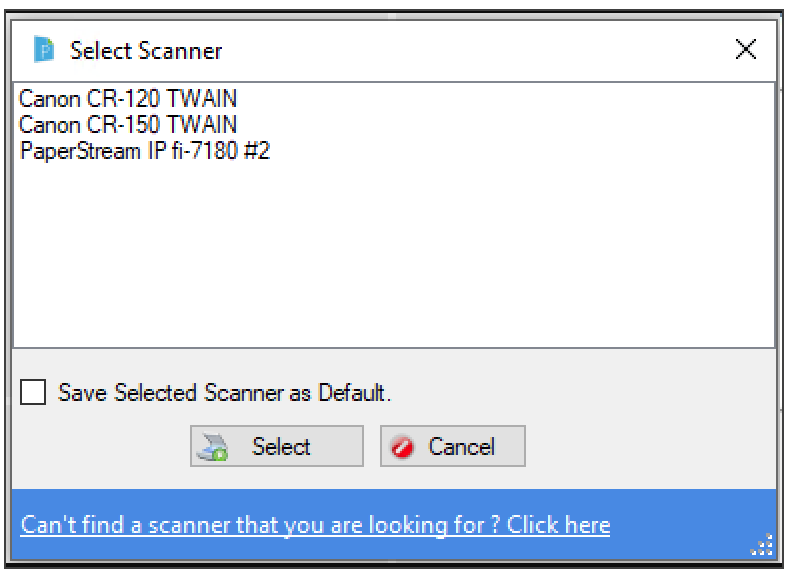
ScanNow using TWAIN compliant scanner

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

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

Duplex	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

16 GB RAM			
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

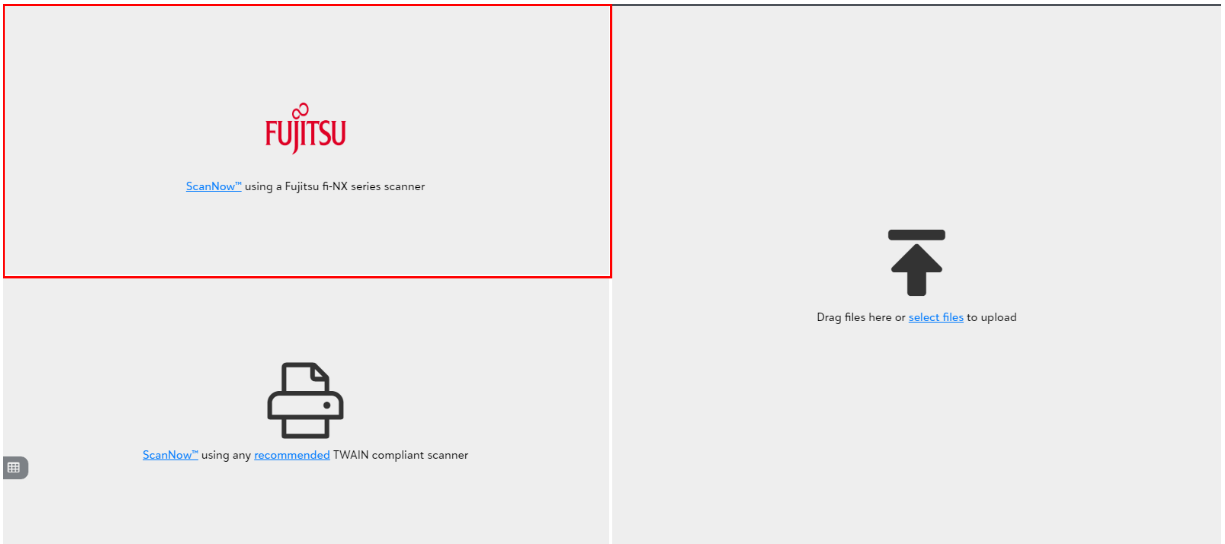
8 GB RAM			
Page Side	**DPI**	**Scan Type**	**Total Pages**
Single	200&300	Black & White/Color/Gray	Upto 600
Duplex	200&300	Black & White/Color/Gray	Upto 600

> **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.

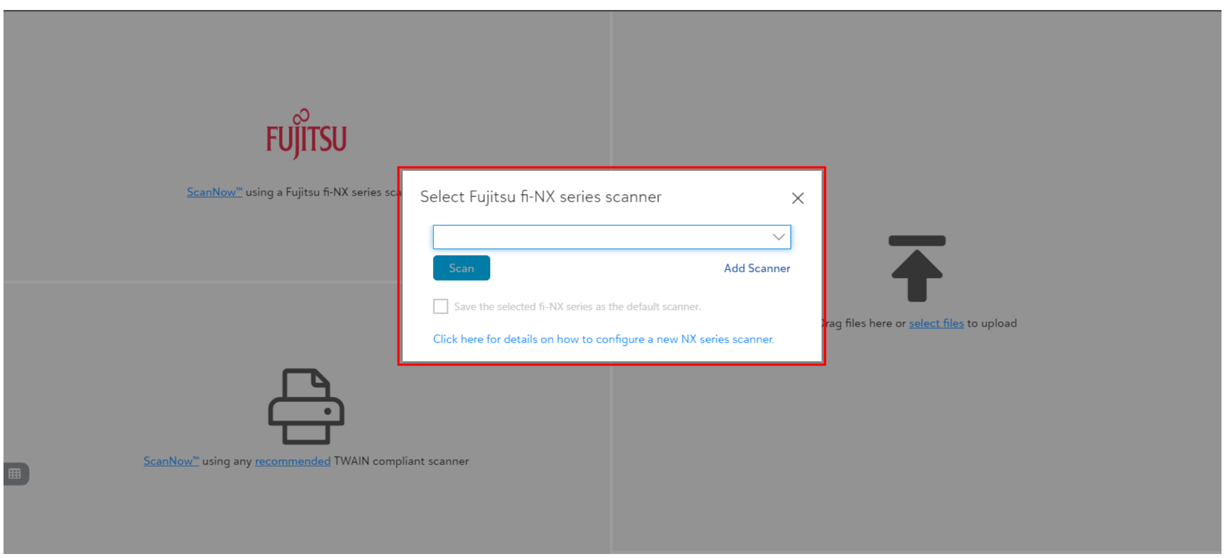
ScanNow using Fujitsu fi-NX scanner

Watch the video to learn how to scan the documents using Fujitsu fi-NX scanner to add to the Workflow.

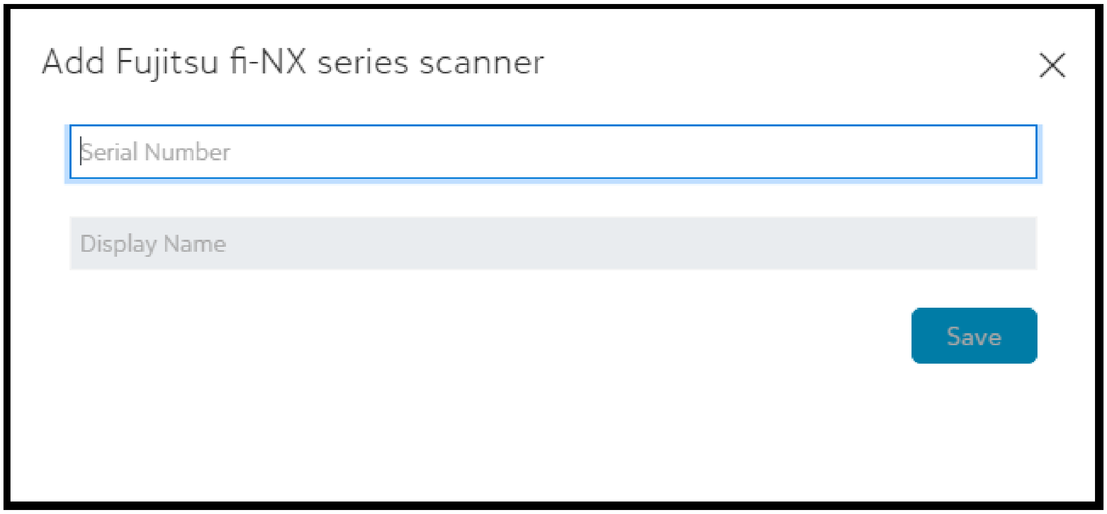
1) Click on the "**Scan Now^{TM} using Fujitsu fi-NX series scanner**" in the file capture options panel to add a document from a Fujitsu fi-NX series scanner as shown below.



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.



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:

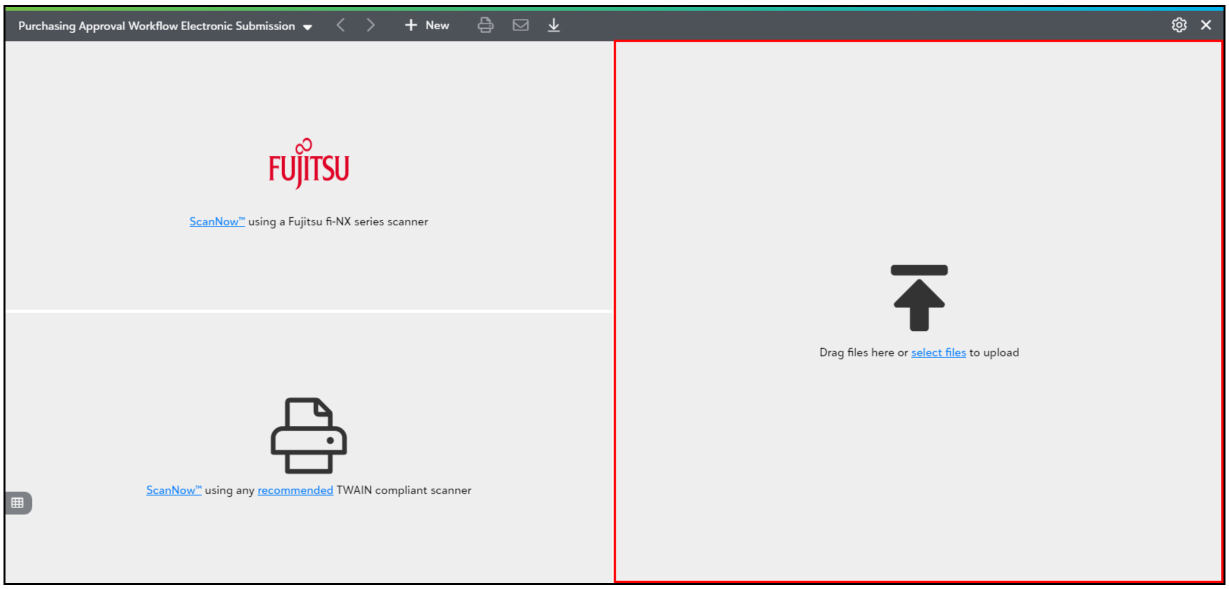
- Drag one or more documents from your file explorer to drag files tile in the file capture options panel.
- Click on "**select files**" (from within the Drag files tile) to select one or more documents through your file explorer as shown below.

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.



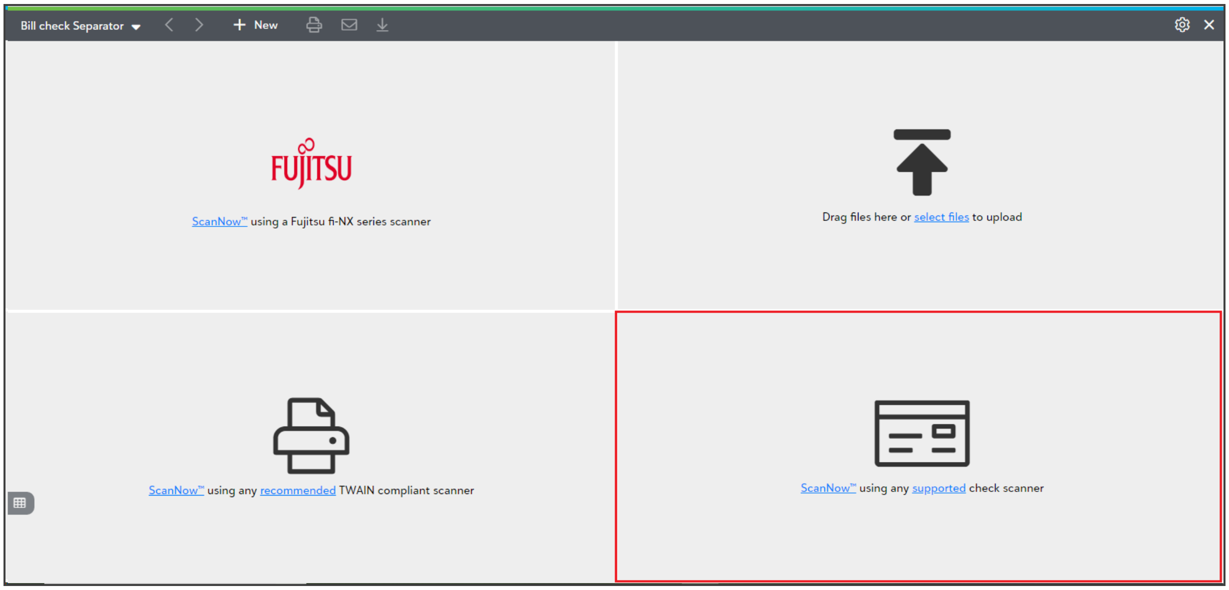
Note: Once you acquire the item, you can validate and submit the unsubmitted document to the Workflow. Click here to learn in detail about validating and submitting the documents.

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.



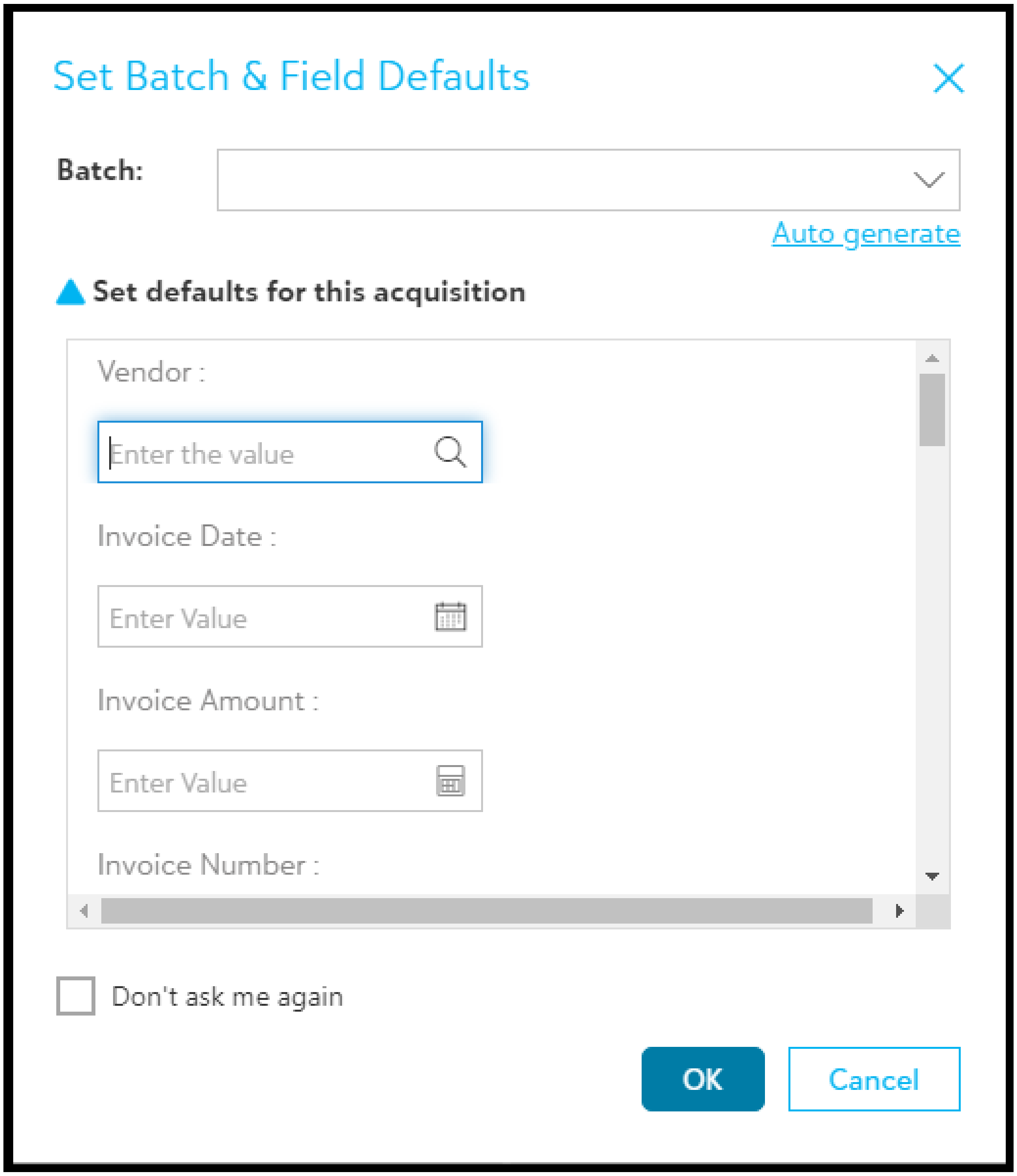
2) You will be prompted to pick a scanner from the available list of scanners upon clicking "ScanNow™using any supported check scanner".

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.



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, ¿, ¡
>
> French characters to be considered:
> - ë, ï, ü, à, è, ù, â, ê, î, ô, û, é, Ç

Setting defaults for this Acquisition

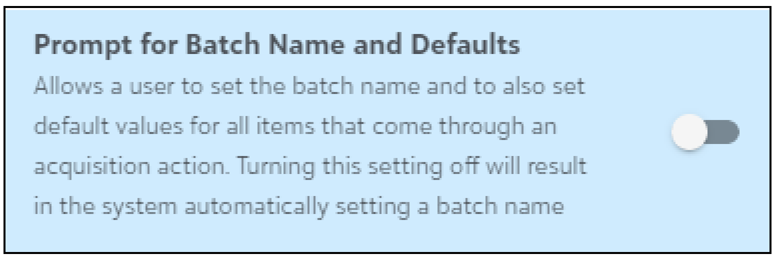
You can set default values for Profile fields on single or group of items that you acquire.

> **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.

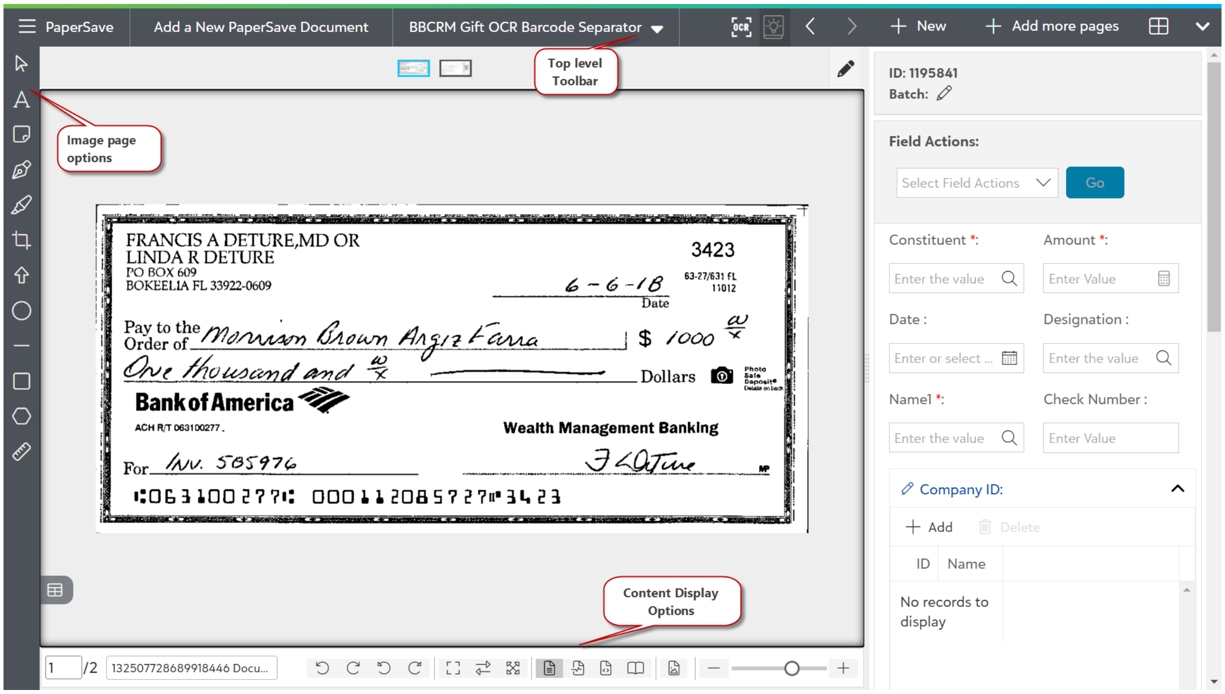


Validating and submitting the Workflow documents

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.

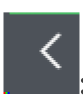
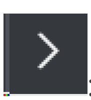
The below screen displays the various options available in the Item viewer for validating the Workflow item.



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:**

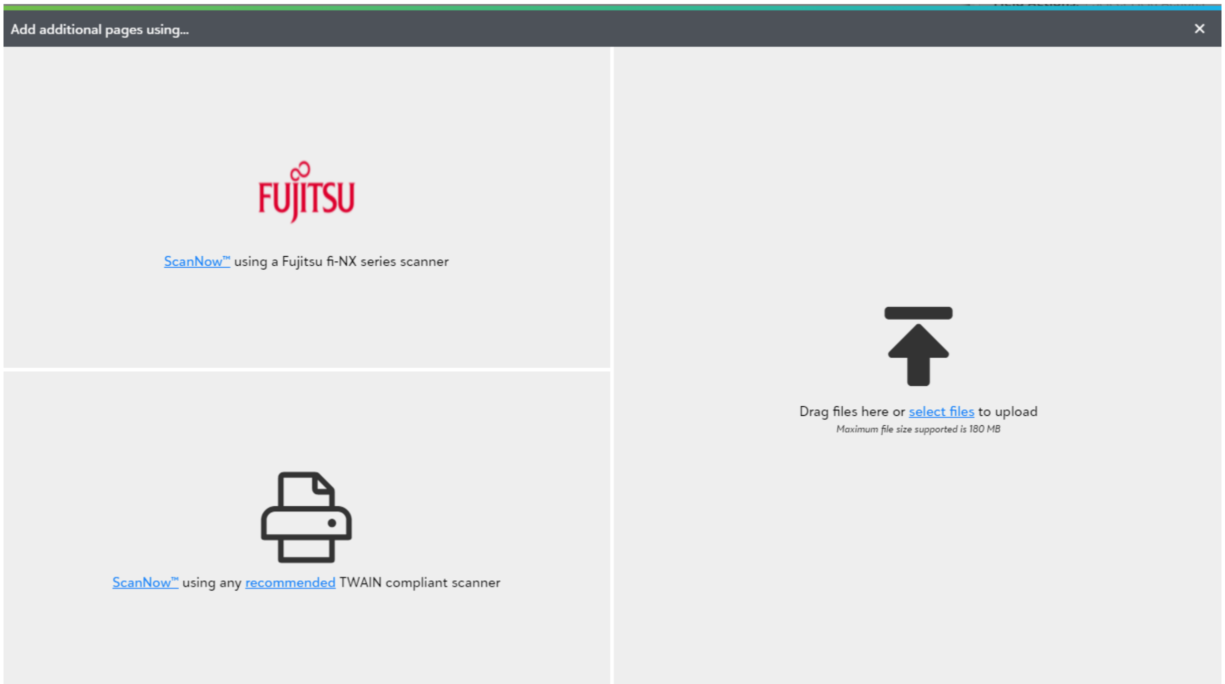
The following are the options in the top level toolbar of item viewer for unsubmitted items:

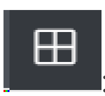
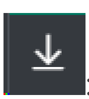
- : Click on this option to navigate to the previous unsubmitted item. It will be disabled if there is no previous item.
- :Click on this option to navigate to the next unsubmitted item. It will be disabled if there is no next item.
- 

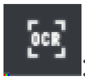
: Click on this option to switch to File capture options panel to acquire a new document.

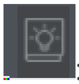
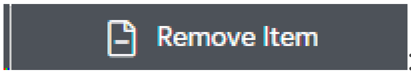
- 

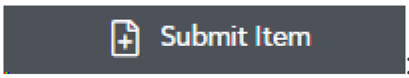
: Click on this option to add more pages to the current document. clicking on this option will display the following "Add additional pages" prompt.



- : 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.
- 

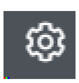
: Click on this option to submit items selected in the unsubmitted item list.

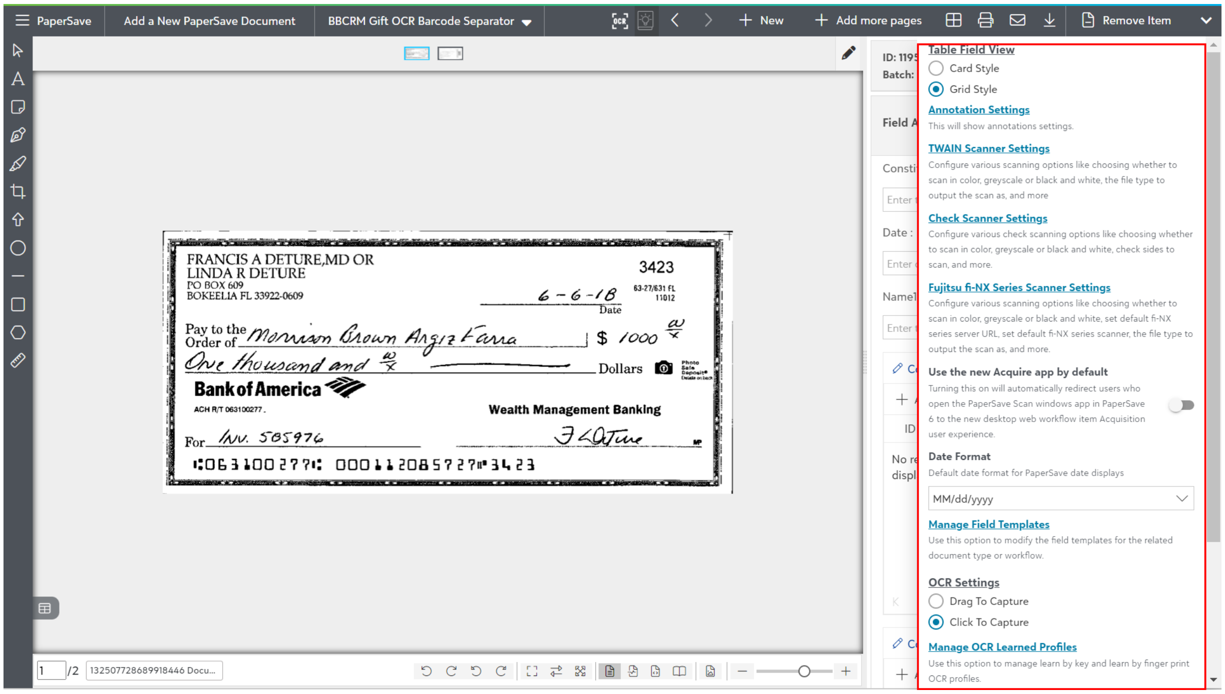
2)**Using Image page options(Annotations) for Unsubmitted items**

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:



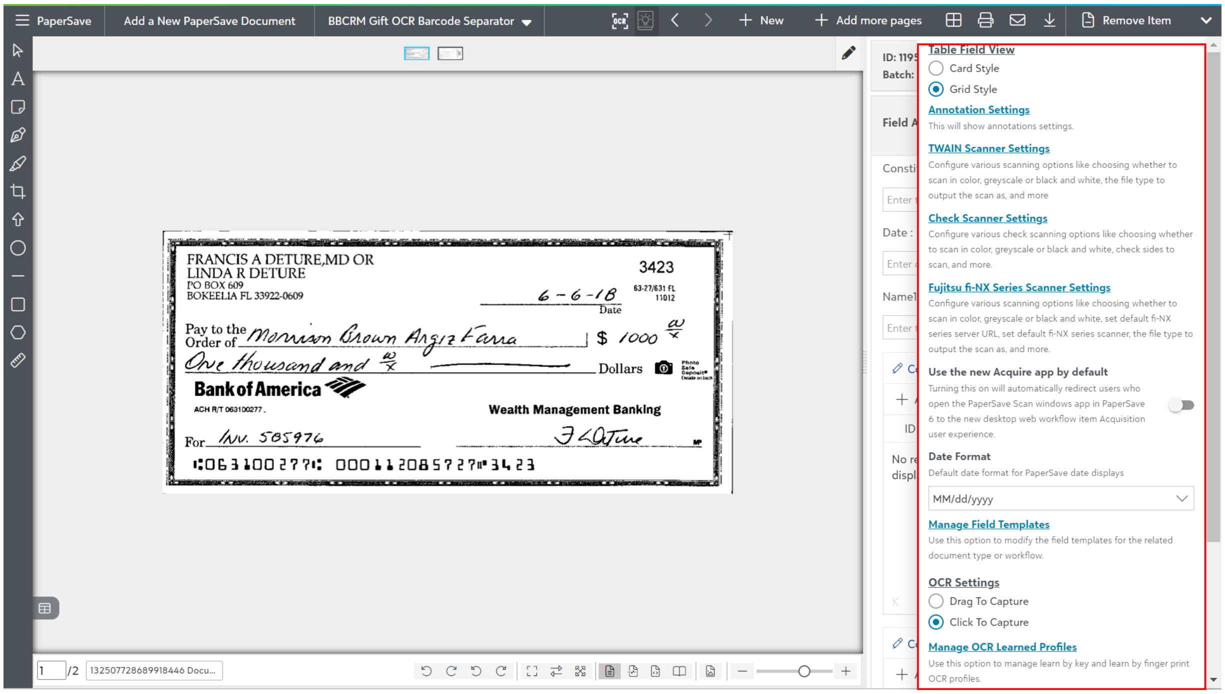
The following is the brief description of various preferences in the Settings panel:

a) **Table Field View**

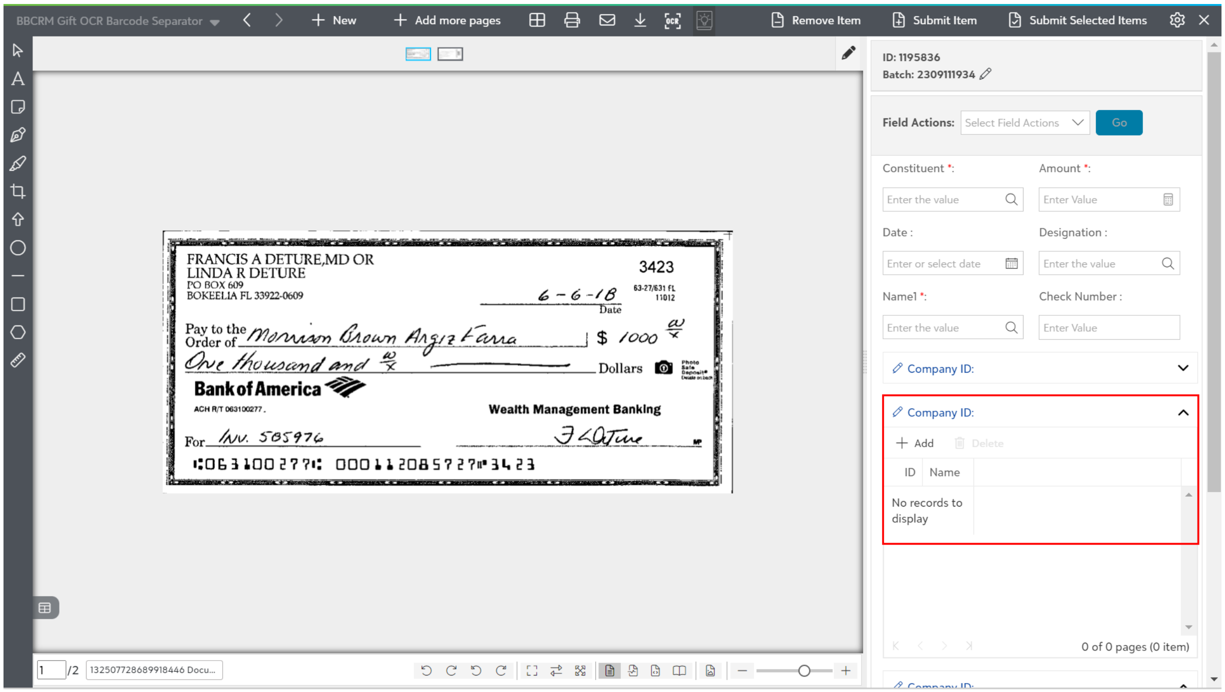
PaperSave offers a widget with two different user interfaces (card style and grid style) for the table type fields in the document profile field panel. Card style is set as the default option.

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:

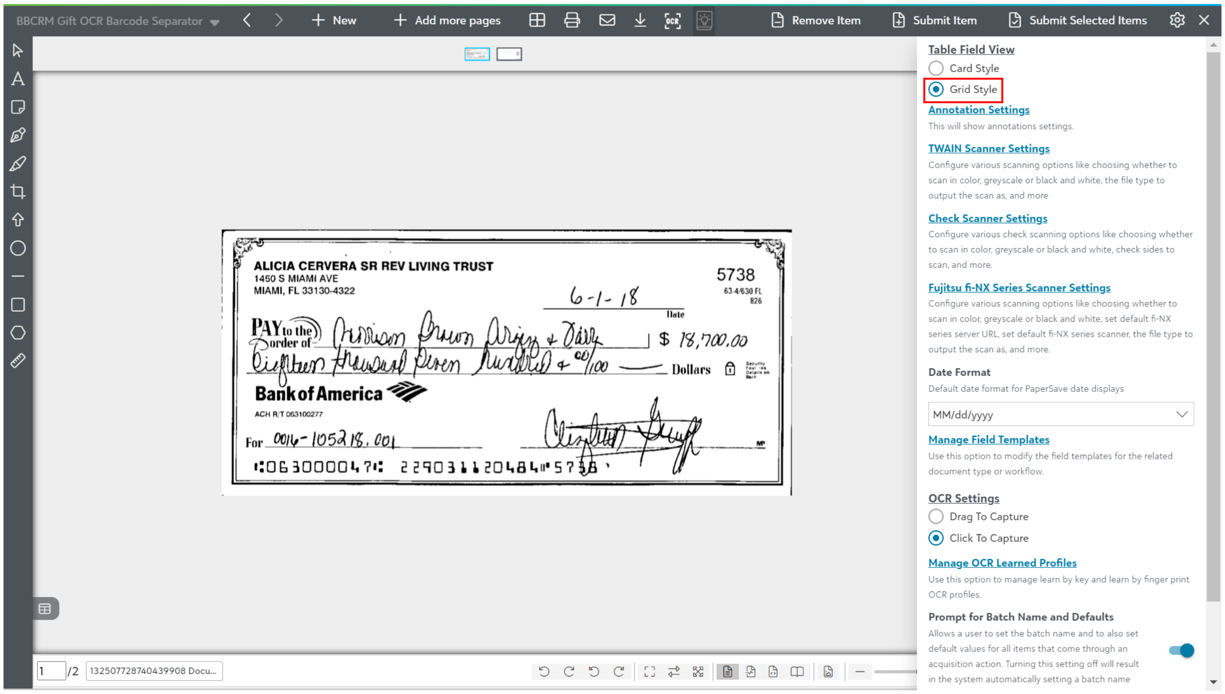


- You will see "**Card Style view**" for the Table type fields in the document profile field panel while editing the field as shown below.

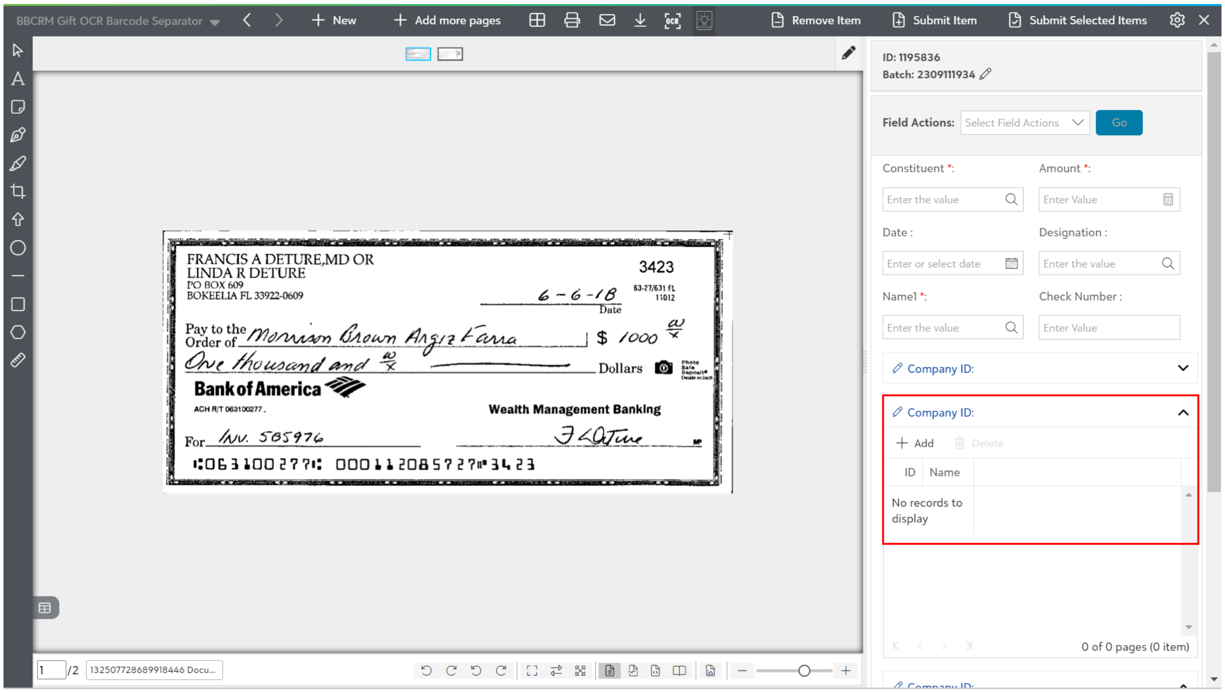


b) **Grid Style**: It switches the "table type field" widget to Grid style view.

- Select the Grid style option in the Table field view Settings as shown below:

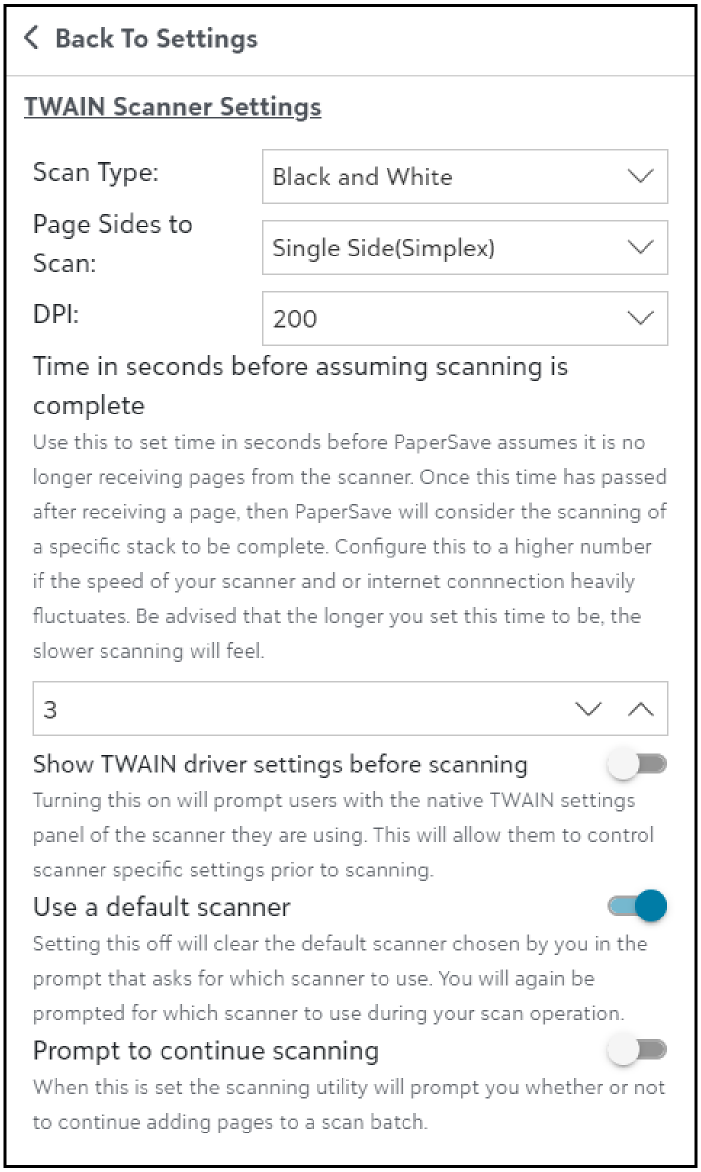


- You will see "**Grid Style view**" for the Table type fields in the document profile field panel as shown below.



b) **Annotation Settings**

This Setting option enables you to adjust the following preferences for each annotation tool in the Workflow Item Viewer.



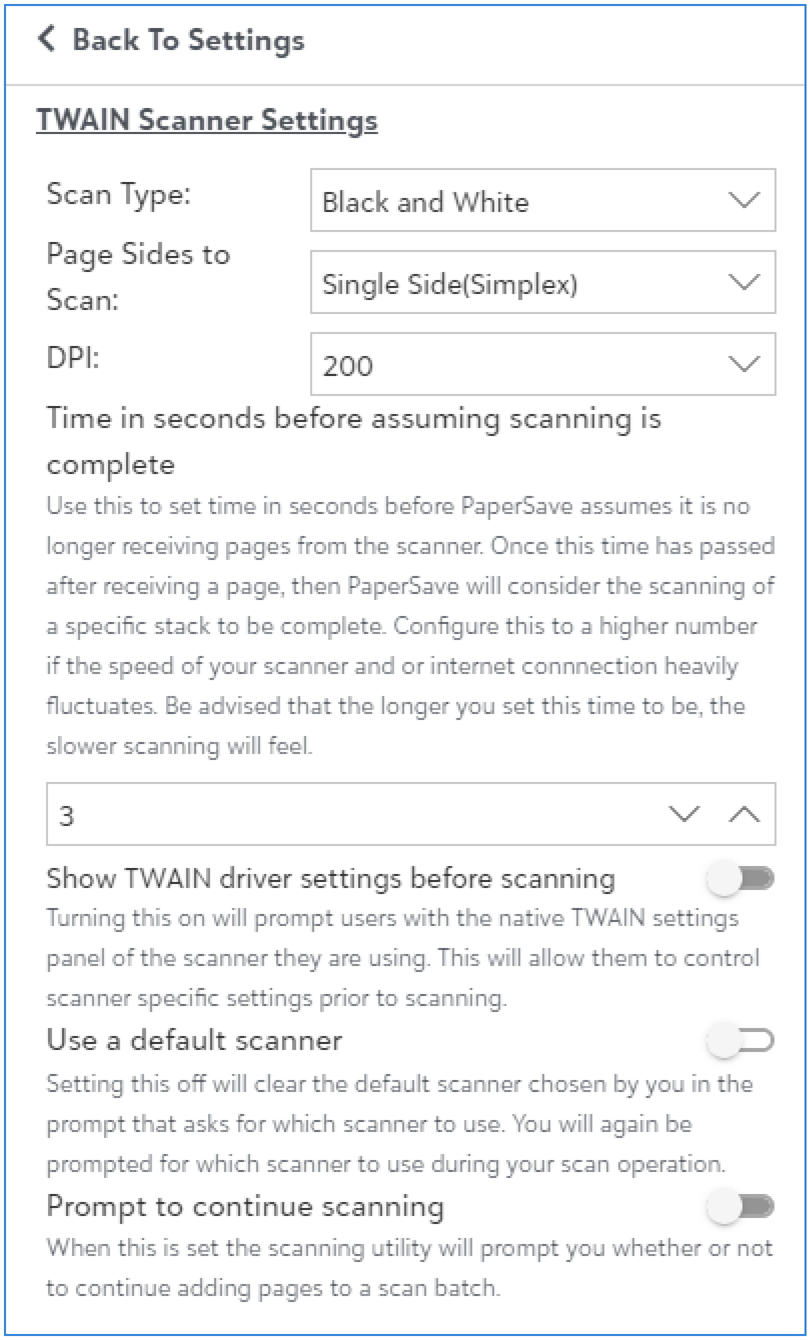
Text, Note: Select font, font size, default text, vertical and horizontal alignment.

Pen, Circle, Line, Polygon, and Arrow: Select the thickness and color.

Highlighter: Select the color.

c)**Twain Scanner Settings**

This Setting option enables you to configure the following scanner related preferences as shown below:



- **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**

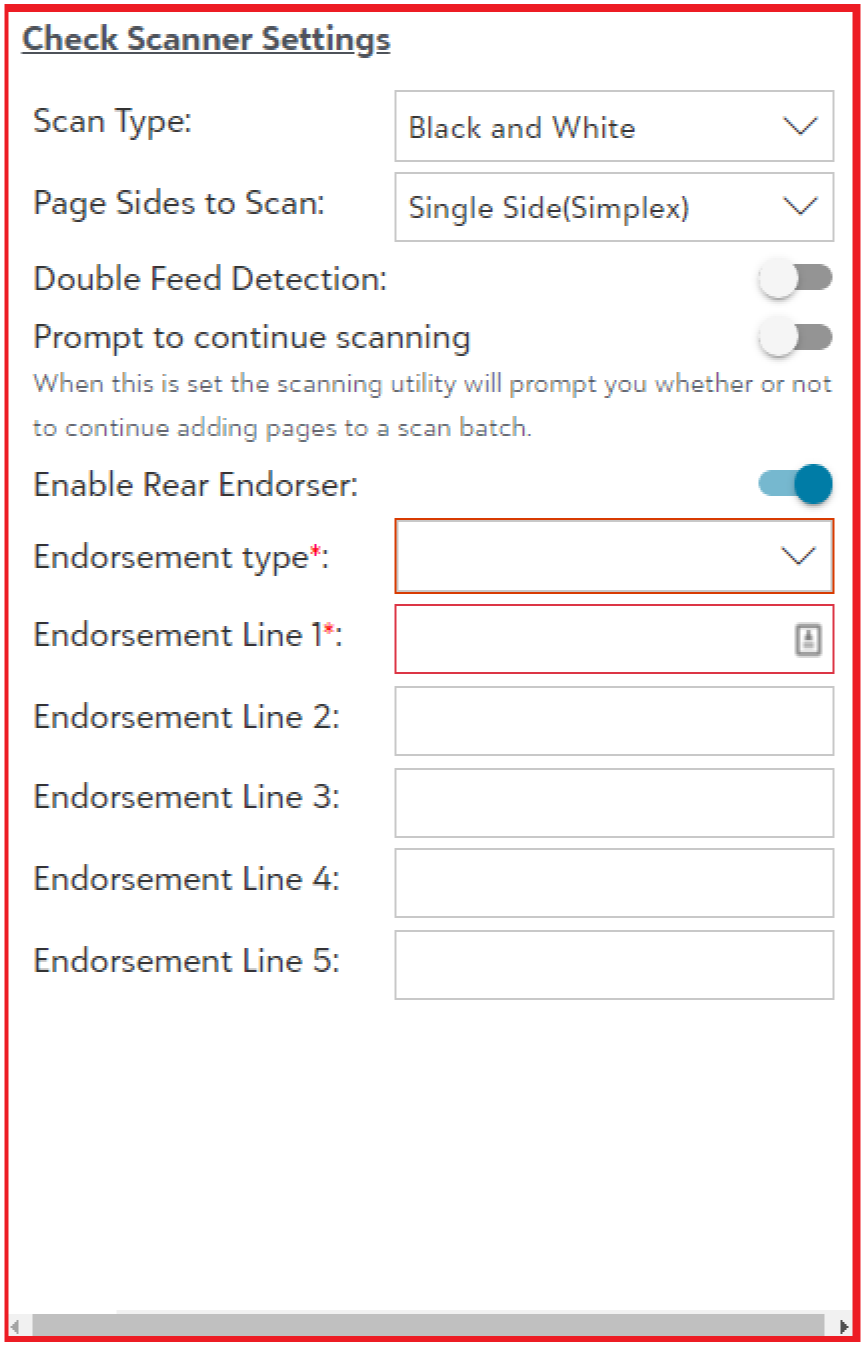
Setting this off will clear the default scanner chosen by you previously, and you will be prompted for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

- **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:



- **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.

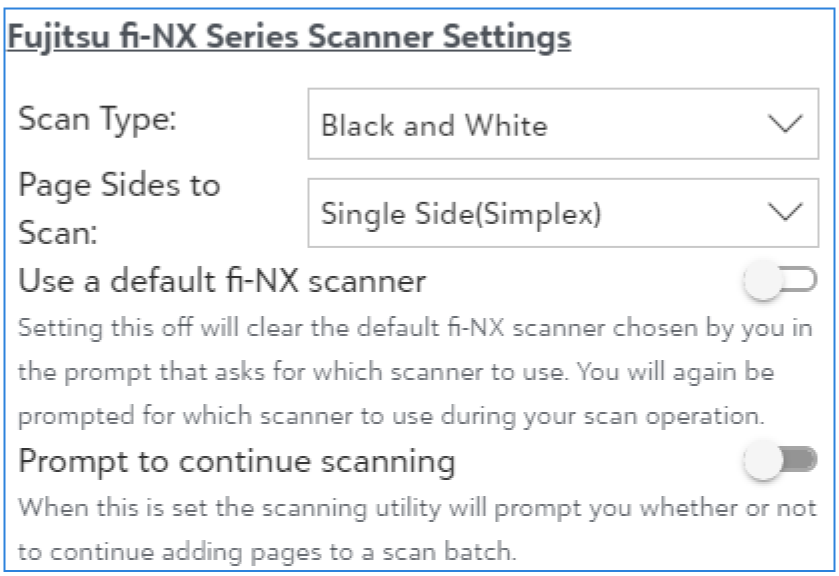
- **Endorsement Line 1 to Endorsement line 5:**

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:



- **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.

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**:

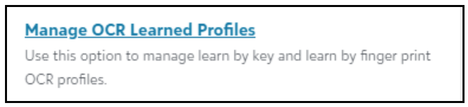
This Setting option enables you to configure OCR-related preferences in the Workflow item viewer, as follows. Set the preference to use the drag or click action to correct the profile fields values on items processed by OCR.

- **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.

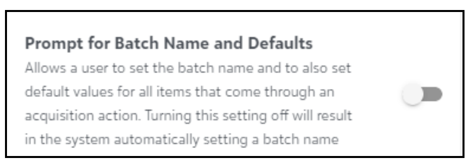
j) **Manage OCR Learned Profiles**

You can use this option to manage the OCR learn by key and learn by finger print OCR profiles.



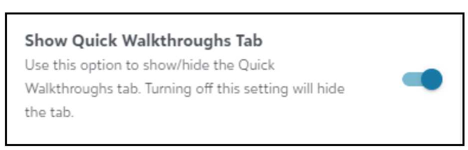
k) **Prompts for Batch Name and Defaults**

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.



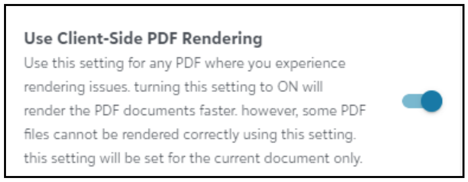
l) **Show Quick Walkthrough Tab**

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.



Review and edit Profile fields

The field panel in 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.

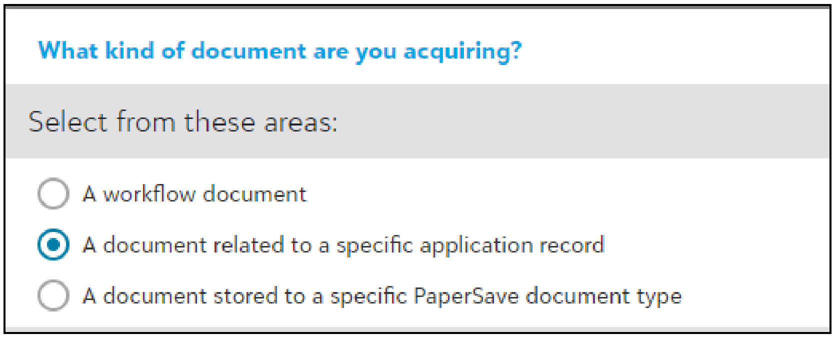
Acquiring document for Integrated Application record

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:

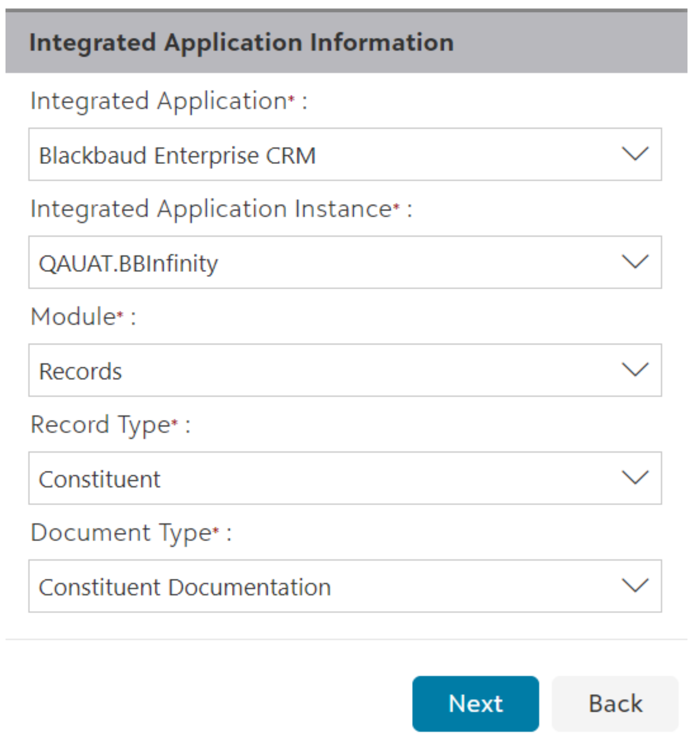
Follow the below steps to acquire document related to an integrated application record:

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.

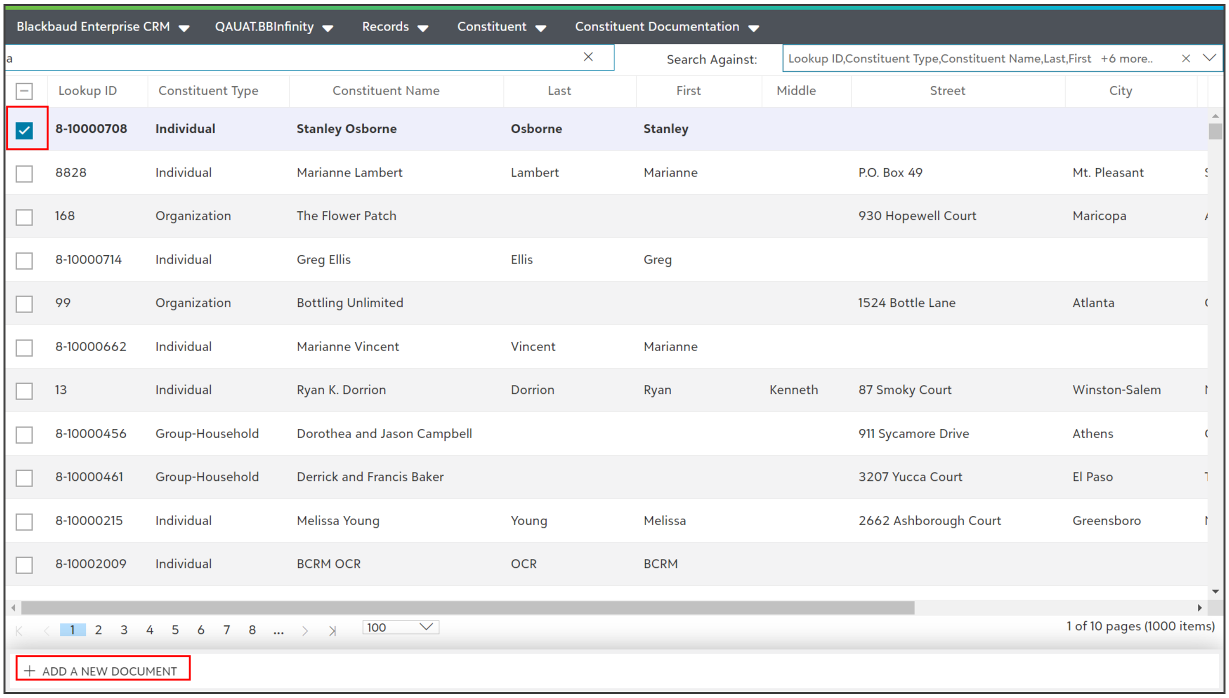
2) Click on "**Next**".



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:

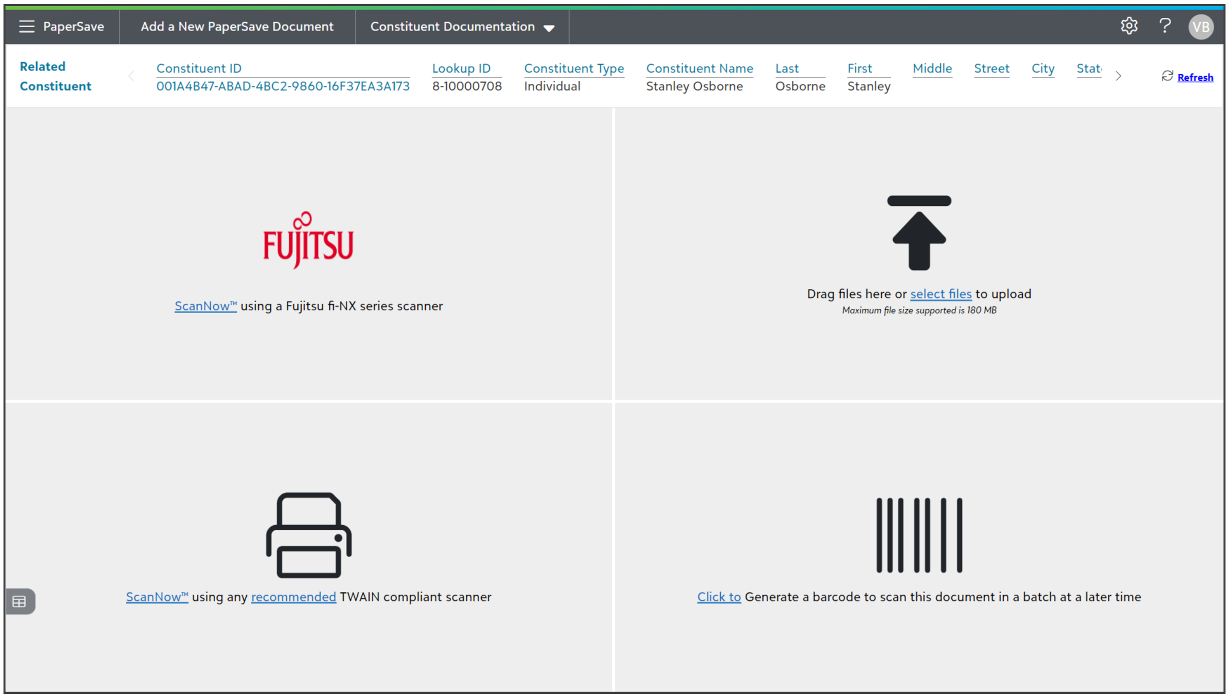


4) You will be navigated to the integrated application records. Select the desired record for which you wish to acquire the document. Then, click on "**Add a New Document**" as shown below:



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:

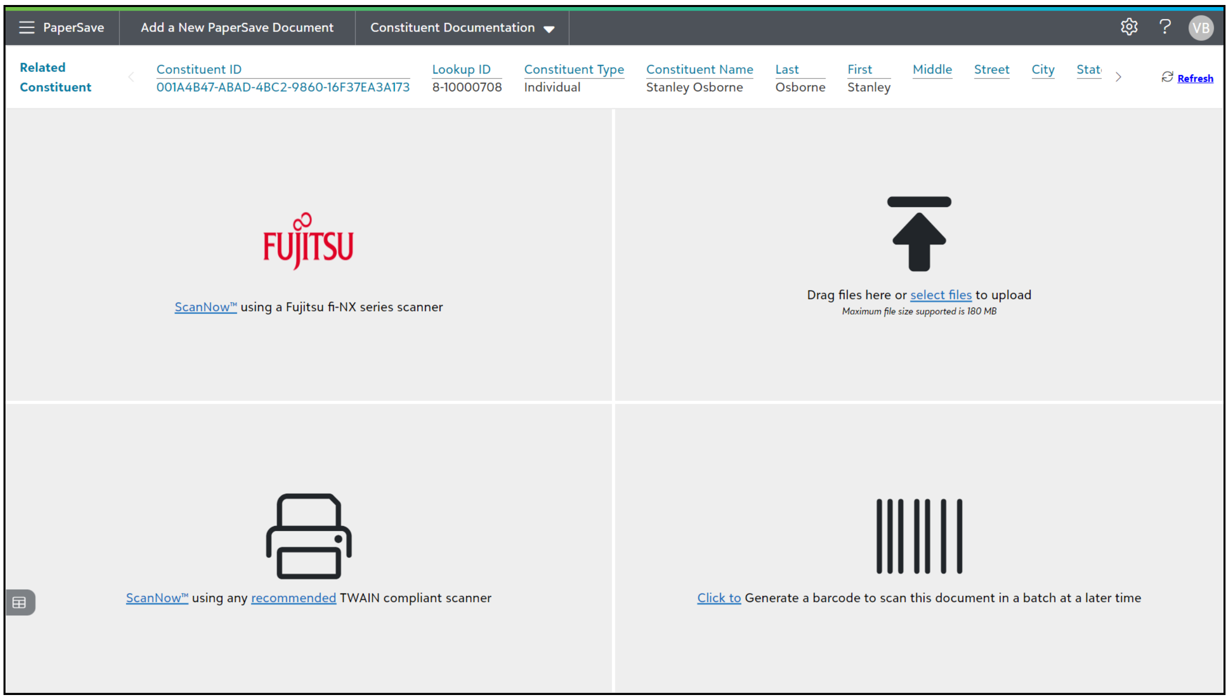
- File capture option panel
- Validating and saving the document in item viewer

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

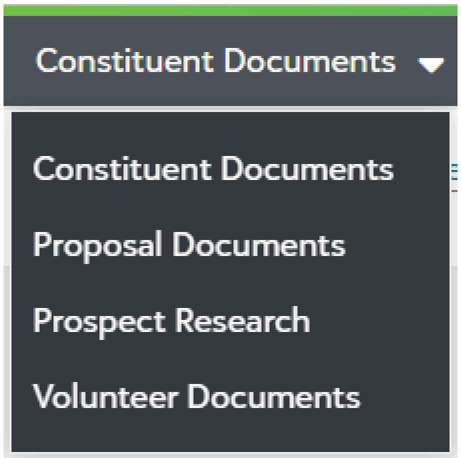


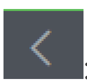
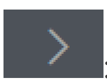
Top level toolbar in file capture options panel

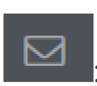
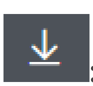
The file capture options panel has a top level toolbar in file capture options panel as shown below:

The following is the brief description of various options in the Top level toolbar in the file capture options:

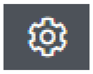
- **Choose Document Type:** Select the desired document type from the available list to acquire a document for that particular document type as shown in following snap.



- **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

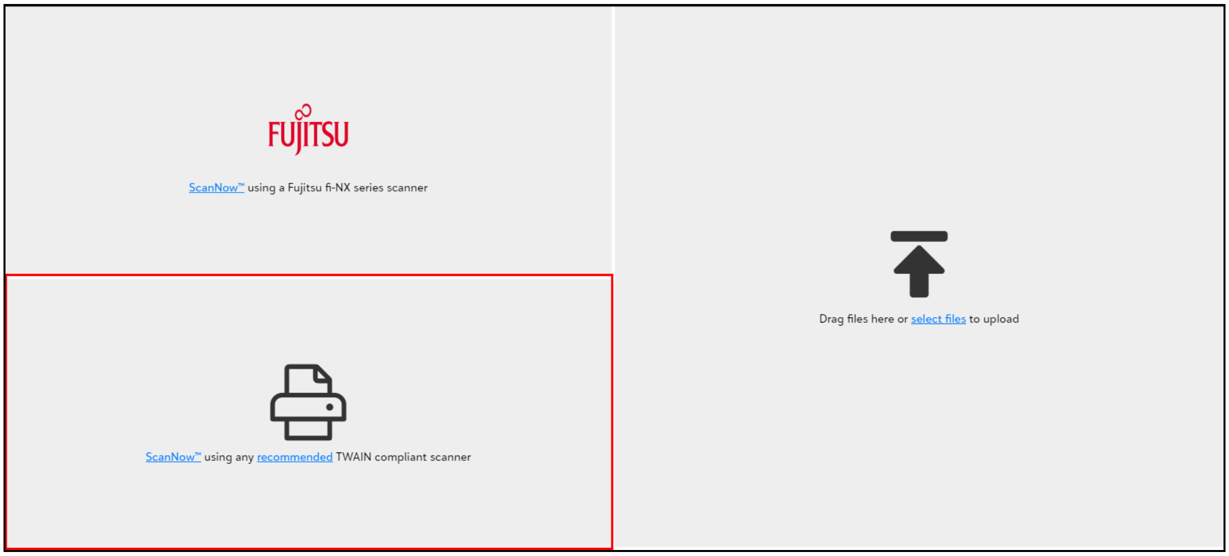
You can control the behavior of various app features from within the Settings panel as shown in the following figure. Click on  to open the settings panel to access various settings options available in the app's unsubmitted document view.

The following video explains different options in File Capture Settings panel in brief

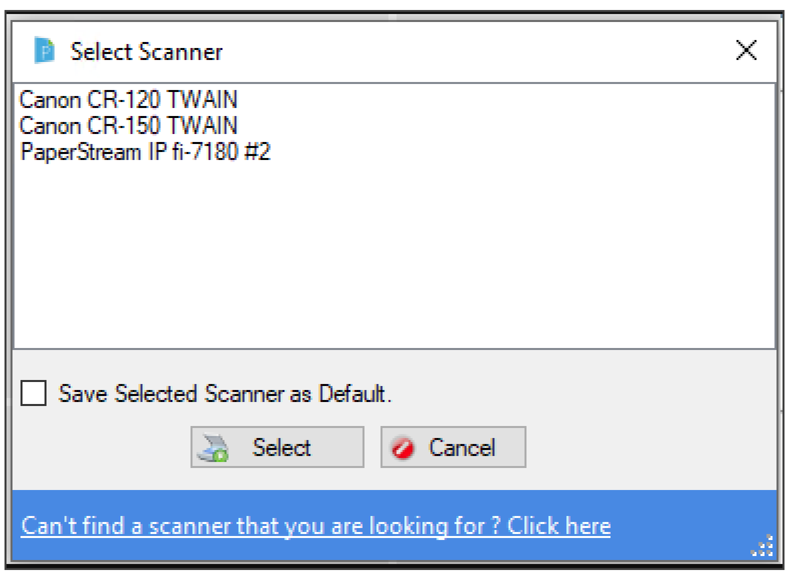
ScanNow using TWAIN scanner

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

Duplex	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

16 GB RAM			
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

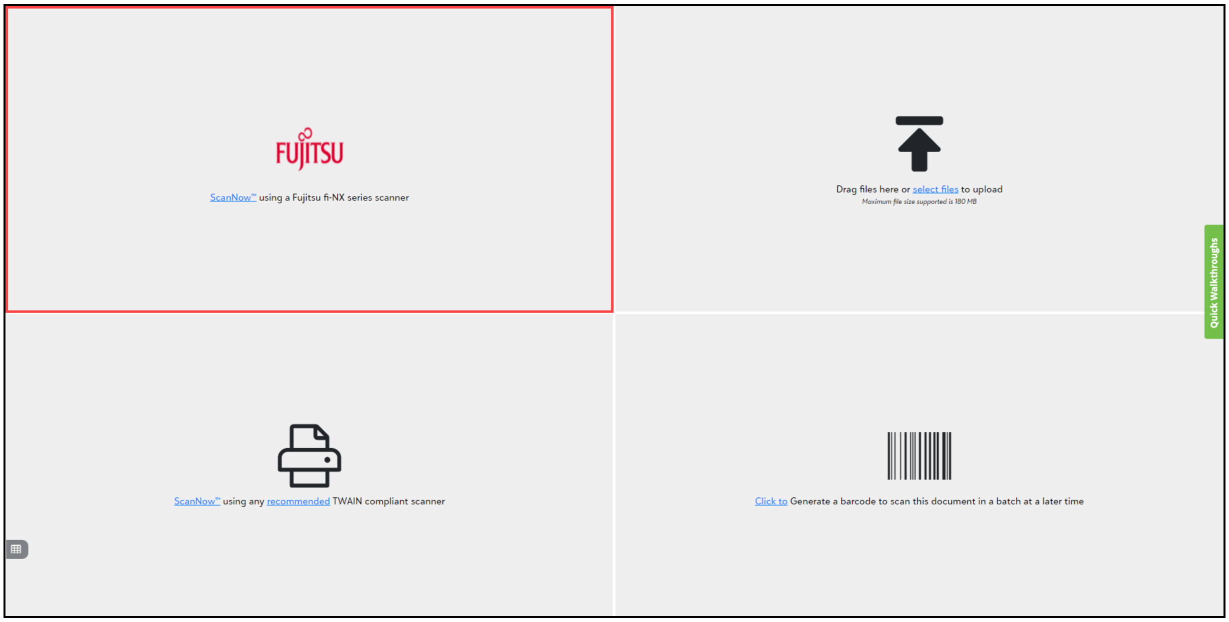
8 GB RAM			
Page Side	**DPI**	**Scan Type**	**Total Pages**
Single	200&300	Black & White/Color/Gray	Upto 600
Duplex	200&300	Black & White/Color/Gray	Upto 600

> **Note:** Once you acquire the item, you can validate and save the document in the integrated app record. Click here to learn in detail about validating and saving the documents.

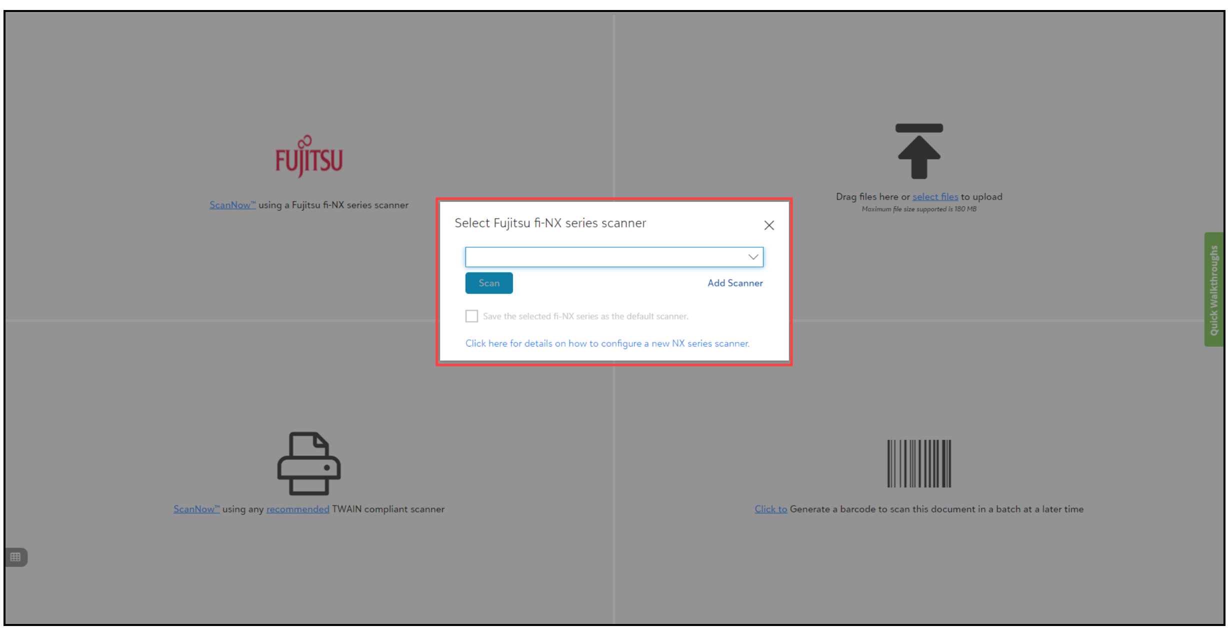
Scan using Fujitsu fi-NX series scanner

Watch the video to know how to add document for an integrated app record using a Fujitsu fi-NX series scanner.

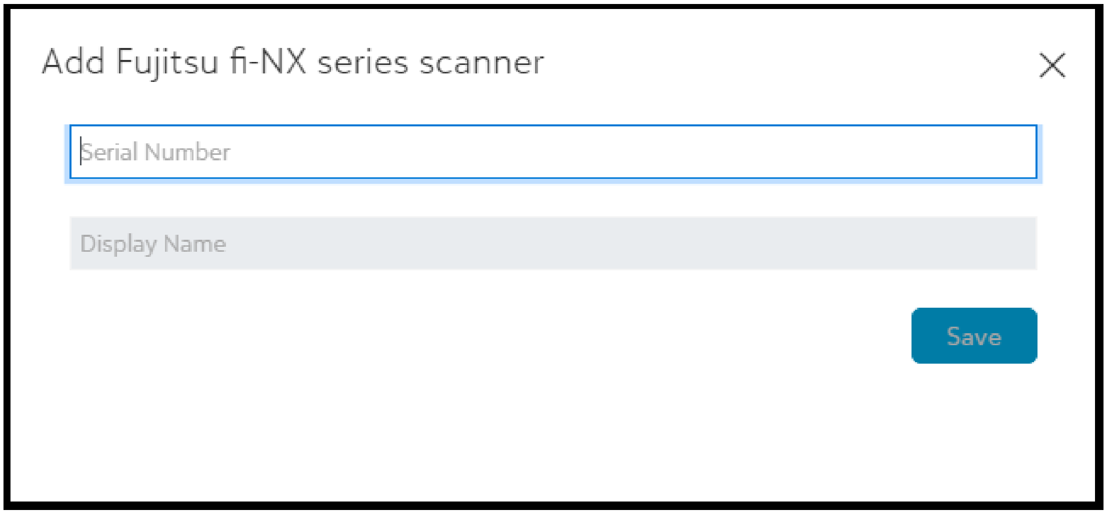
1) Click on the "**ScanNow™ using Fujitsu fi-NX series scanner**" in the file capture options panel to add a document from a Fujitsu fi-NX series scanner as shown below.



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.



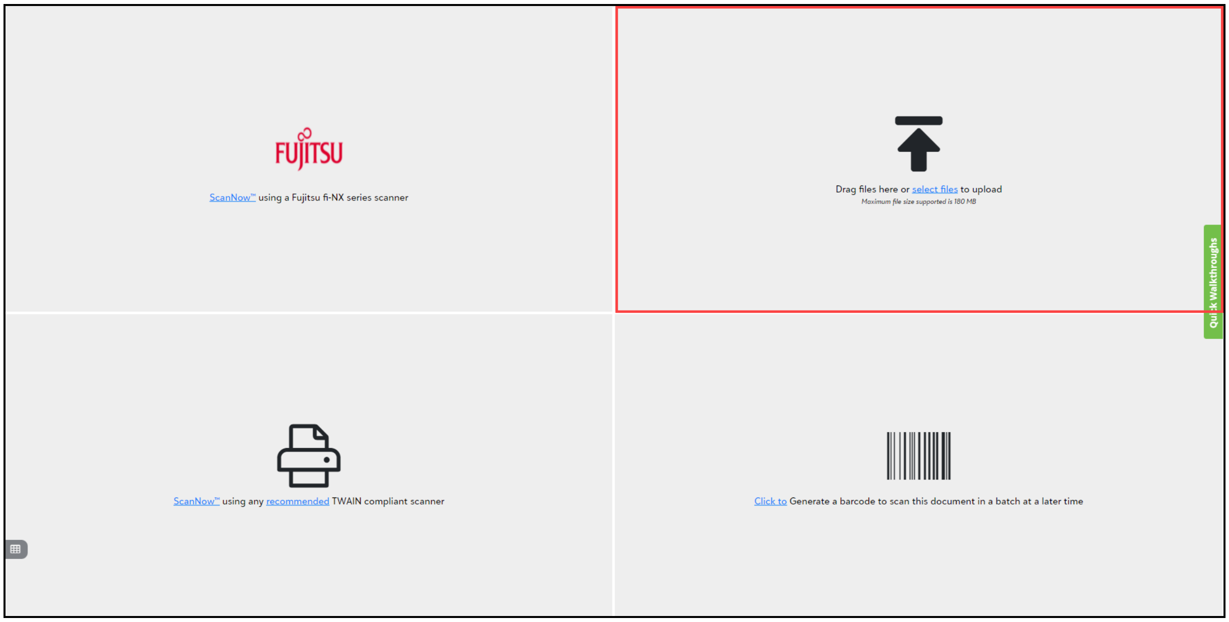
> **Note:** Once you acquire the item, you can validate and save the document in the integrated app record. Click here to learn in detail about validating and saving the documents.

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.



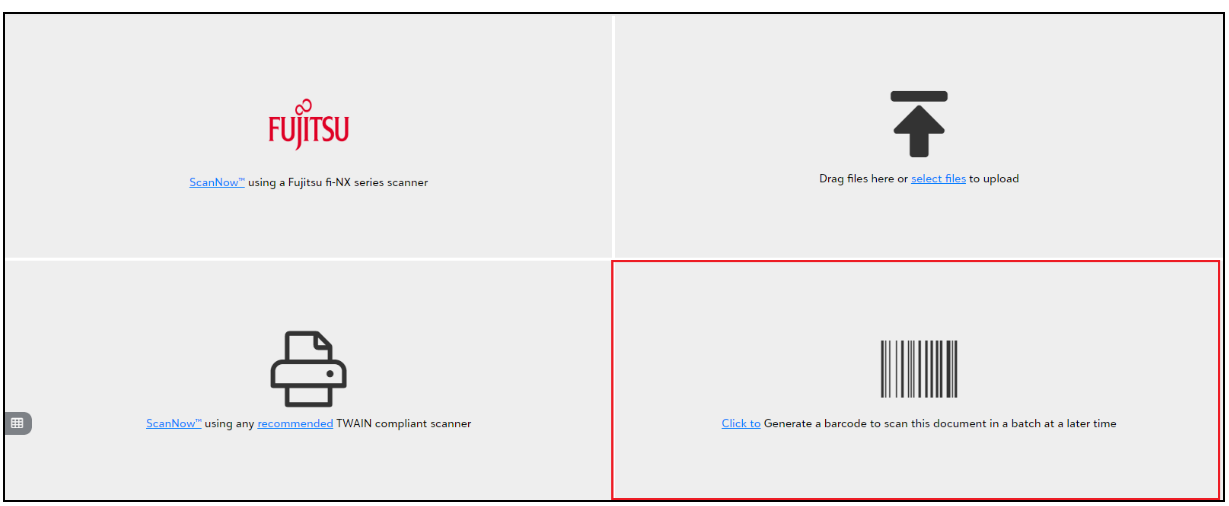
> **Note:** Once you acquire the item, you can validate and save the document in the integrated app record. Click here to learn in detail about validating and saving the documents.

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.

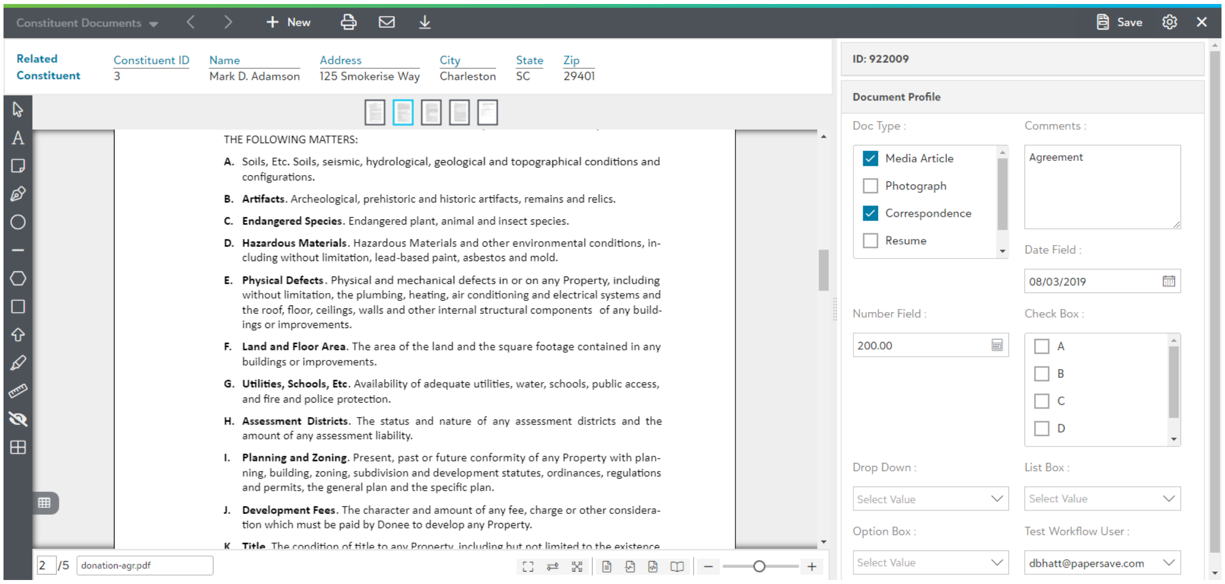
> **Note:** Once you acquire the item, you can validate and save the document in the integrated app record. Click here to learn in detail about validating and saving the documents.

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.

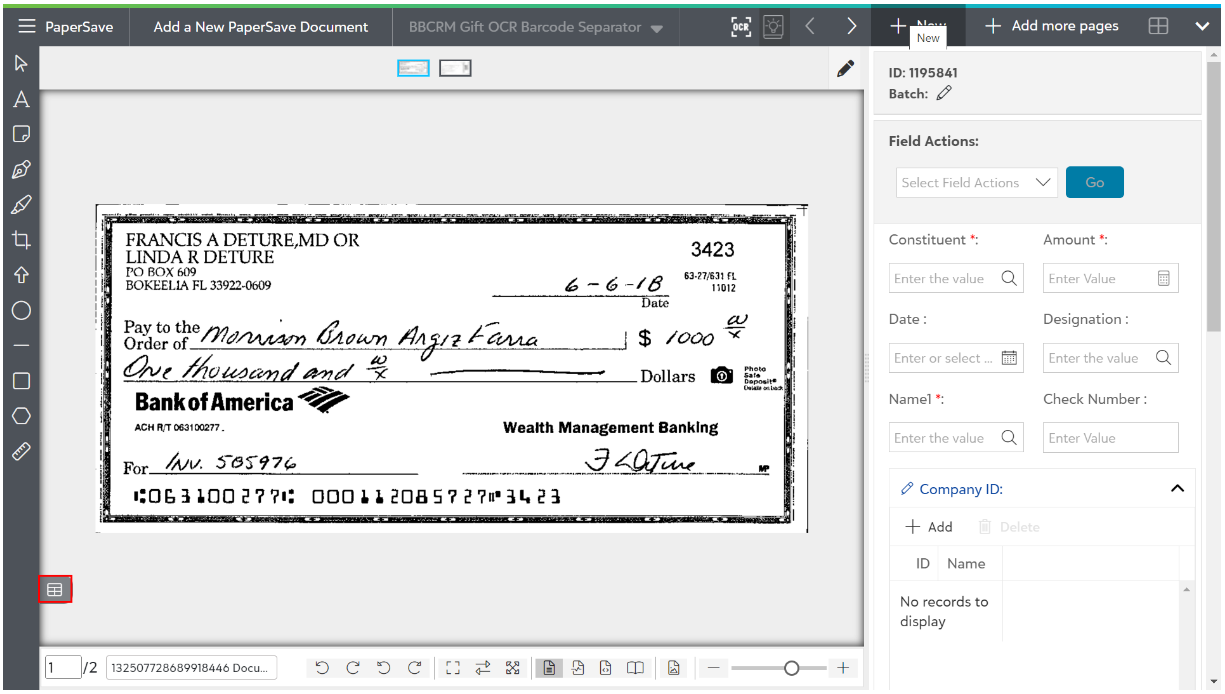
- **Save an acquired document from the item viewer**

Unsubmitted Item list panel

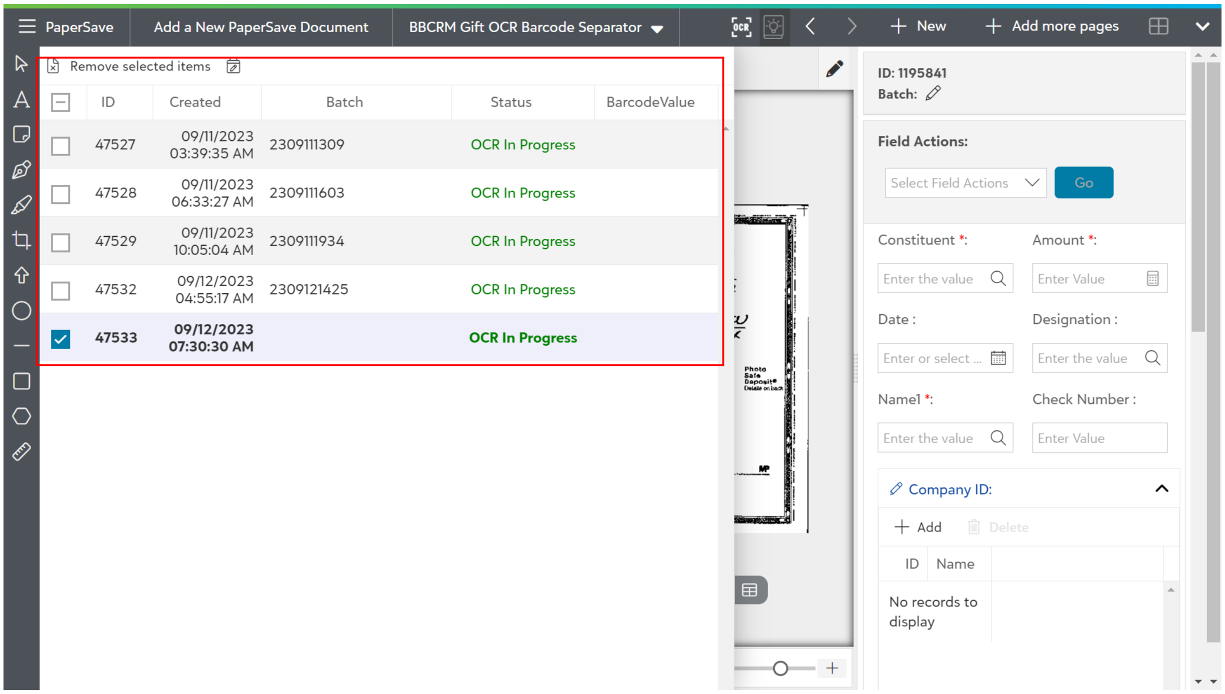
Once you acquire the documents using any of the methods in File Capture options panel, the items can be accessed from unsubmitted items list before you submit the items. Unsubmitted item list comprises the list of Workflow items that are not yet submitted to the selected Workflow.

Watch the video to learn about the Unsubmitted Item list.

1) In the Item viewer, click on  icon to access the unsubmitted item list.

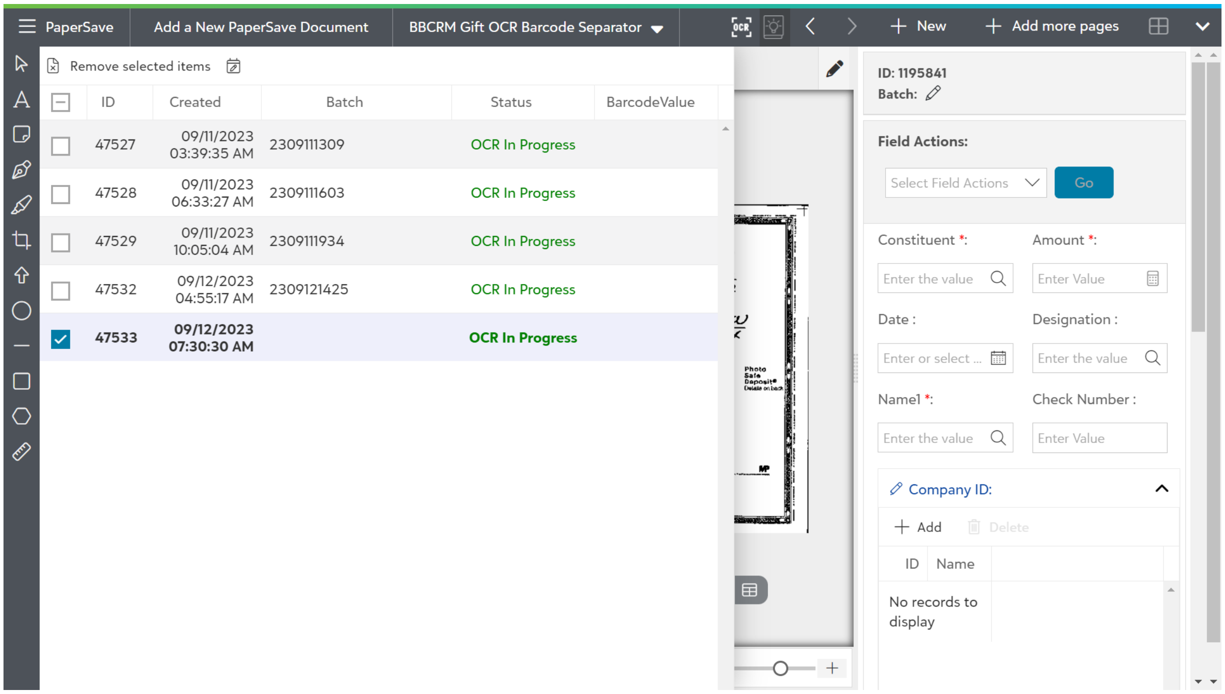


2) As you click on  icon in the item viewer, a slide out panel with the list of unsubmitted items will launch in the left corner of the screen. You can see the profile field details for all the unsubmitted items as shown below.



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.



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.

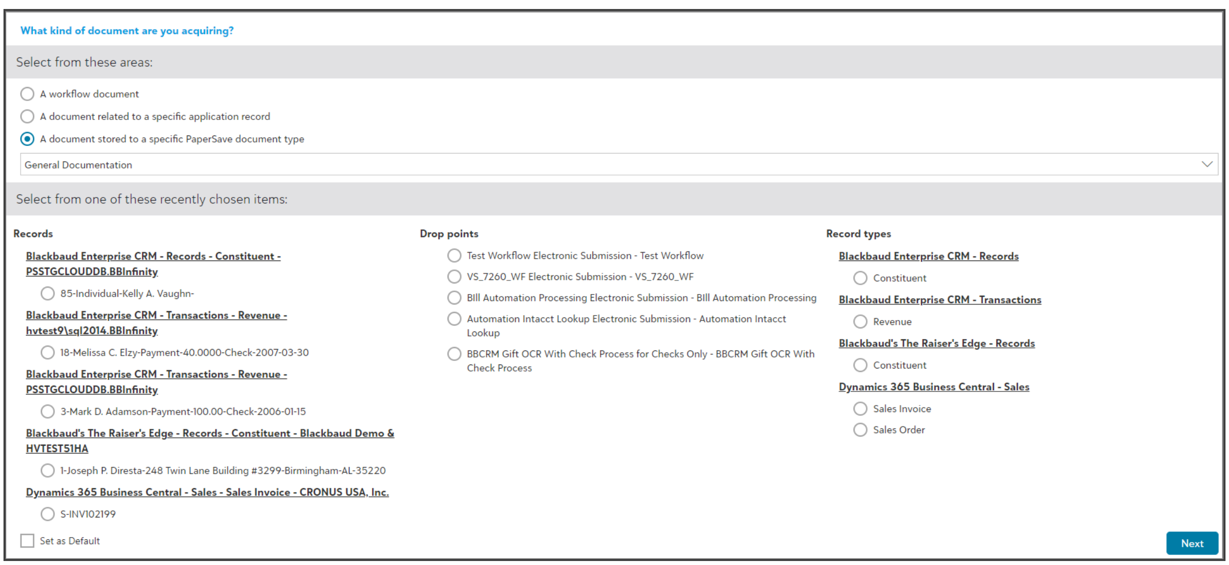
Acquiring PaperSave documents

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.

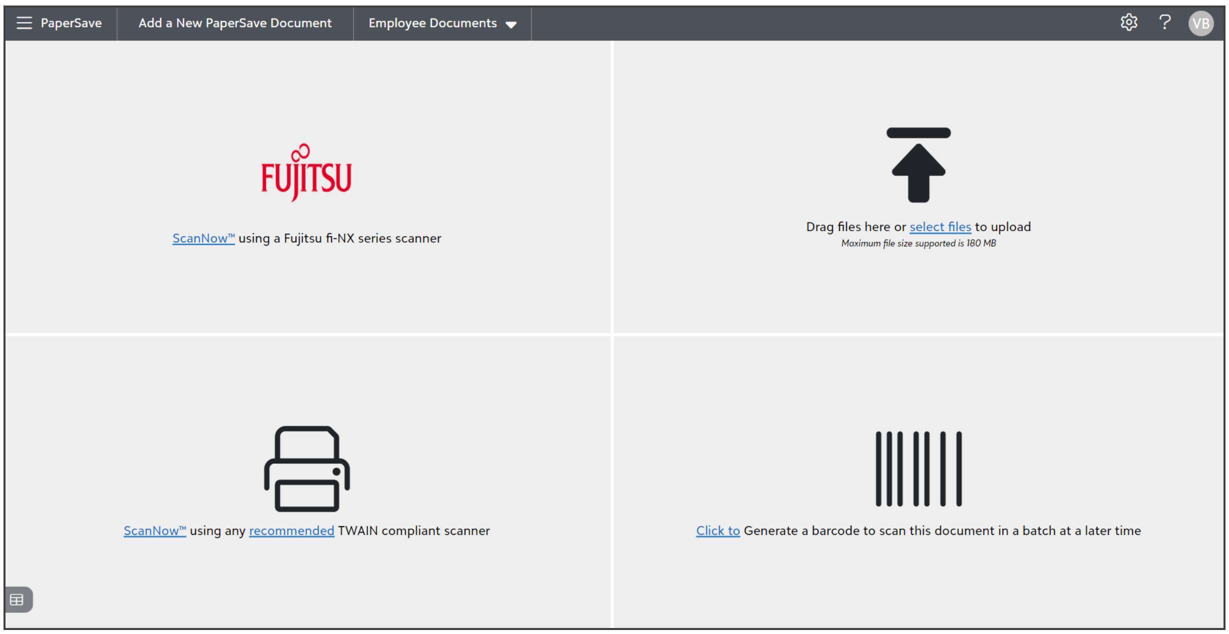
2) Choose the document type from the list.

3) Click on "**Next**".



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



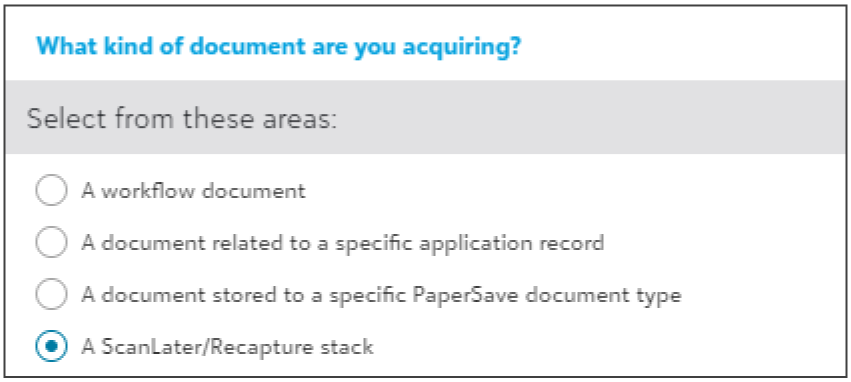
5) Submit the document to the PaperSave upon validating the fields. Thus, you can successfully add documents stored to a specific PaperSave document type.

A ScanLater/Recapture stack

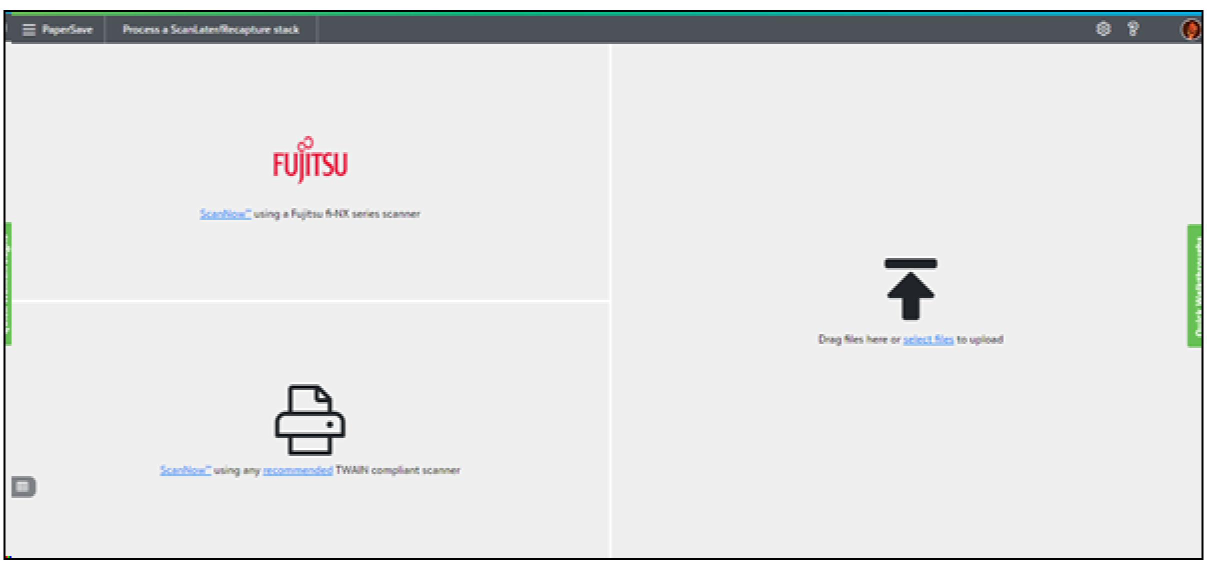
PaperSave offers you the "**A ScanLater/Recapture stack**" option in the Acquire area to add a stack of documents to previously generated ScanLater coversheets. Follow the below steps to use this option:

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.

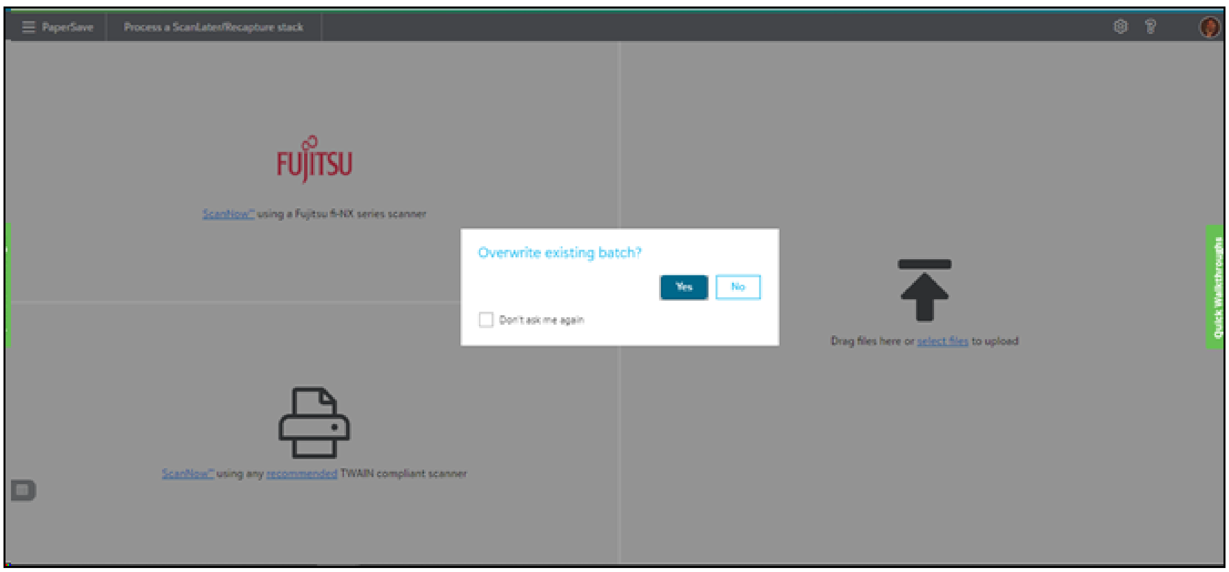


2) You will be directed to the “**Process a ScanLater/Recapture stack**” page to select your preferred acquisition method, as shown on the below screen.

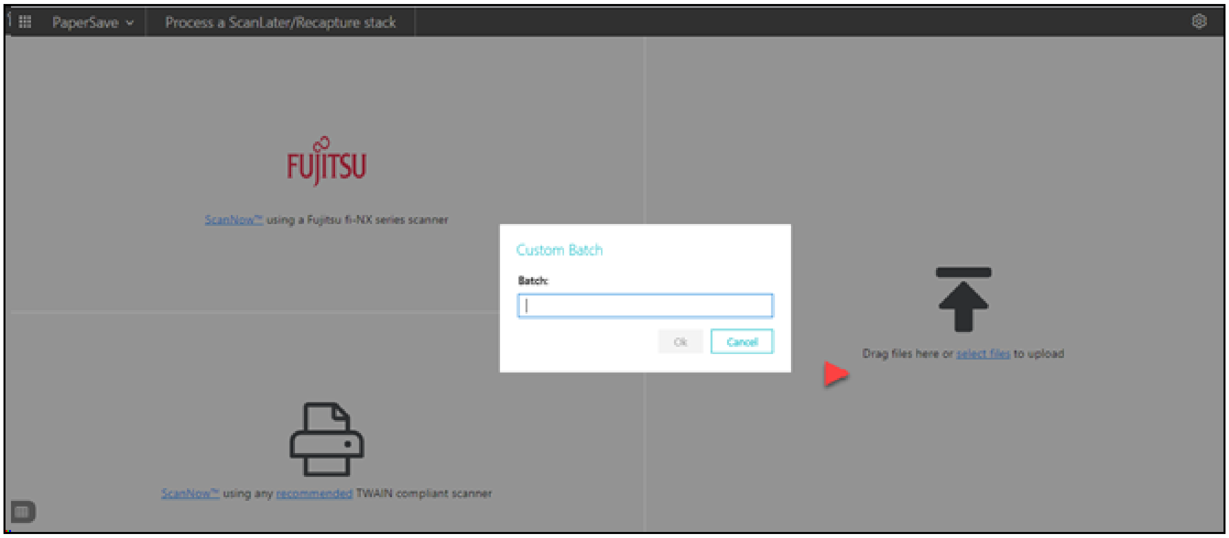


3) Once you add a stack of papers using your desired method, you may be prompted to overwrite the batch value set when the barcode coversheet was created, or create a new batch name, as shown in the below screen.

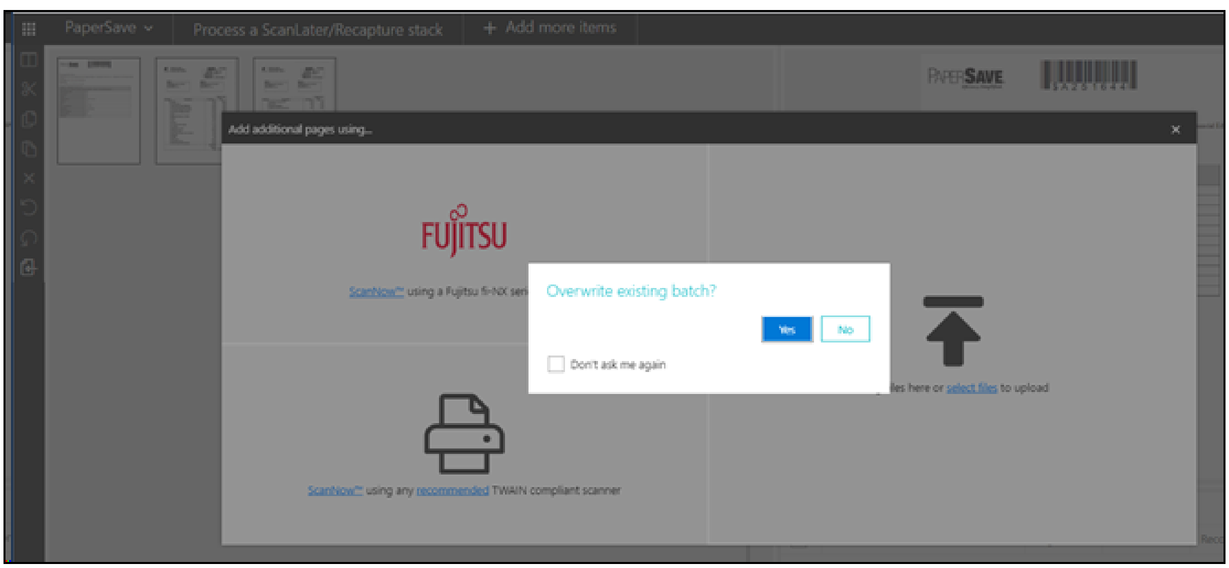
Tip: Click on "**Don't Ask me again**" to disable the prompt. you can change your preference from the Settings panel using the "**Prompt to override the batch value during ScanLater acquisition**" option.



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".

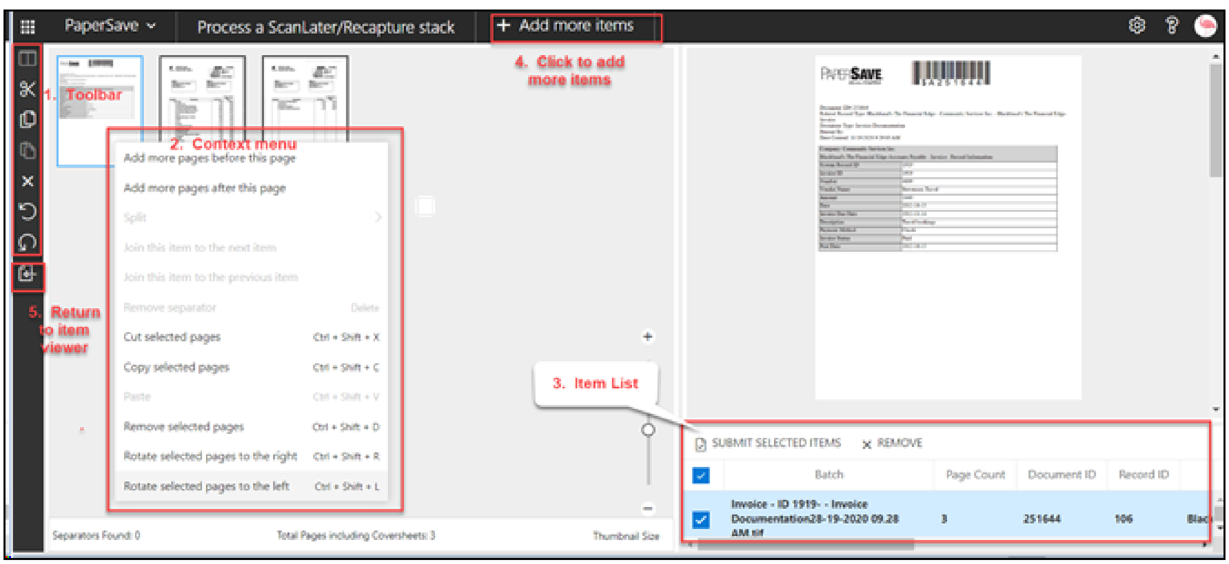


5) If there are one or more unsubmitted item(s) for ScanLater/Recapture, then you will be directed to the "**Page Manipulation View**", showing the unsubmitted items with the option to "**Add more items**". When you click on "Add more items", a popup window will appear for you to select your preferred 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:

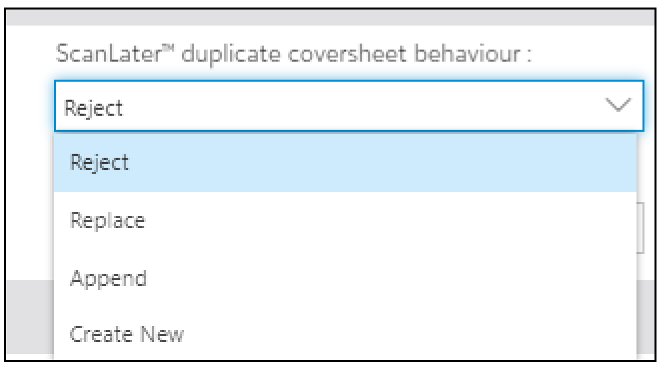
- Add, copy, remove, rotate pages, etc., using the options available in the **Toolbar** on the right.
- Manipulate the pages (thumbnails) using the **Context menu**, which can be accessed by right-clicking on a thumbnail.
- Submit or remove items using the **‘Item List’ toolbar** in the lower right-hand 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.

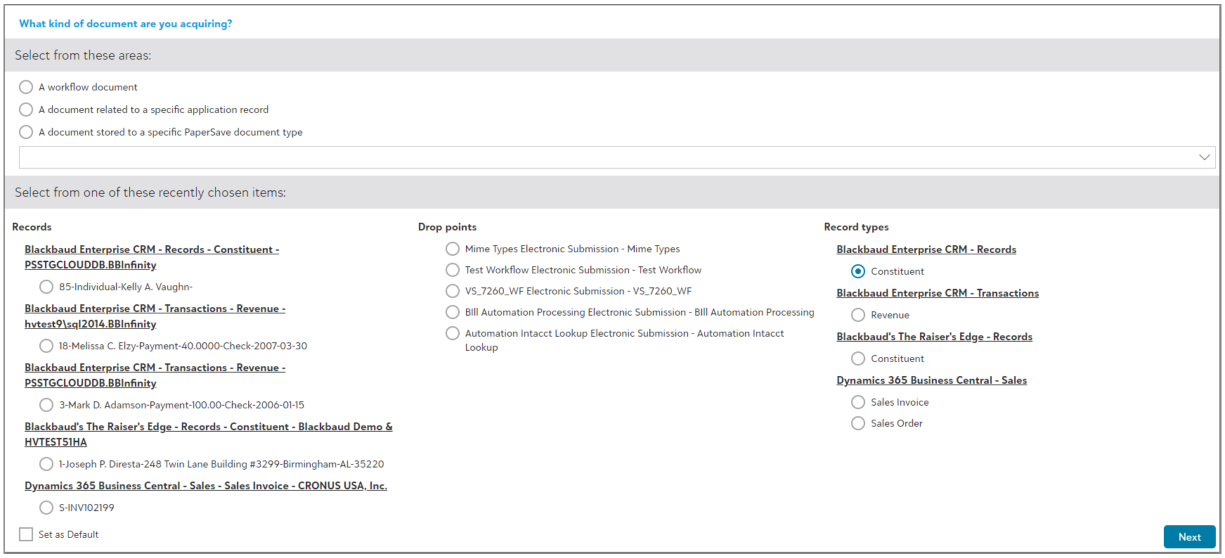
Note: If a coversheet has already been submitted, you will receive a notification in the upper right-hand corner of the page. The duplicate coversheets' behavior depends on the value of the "**ScanLater Duplicate CoverSheet behaviour**" setting, which is defined for each document type in the Configuration 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:



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 can 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

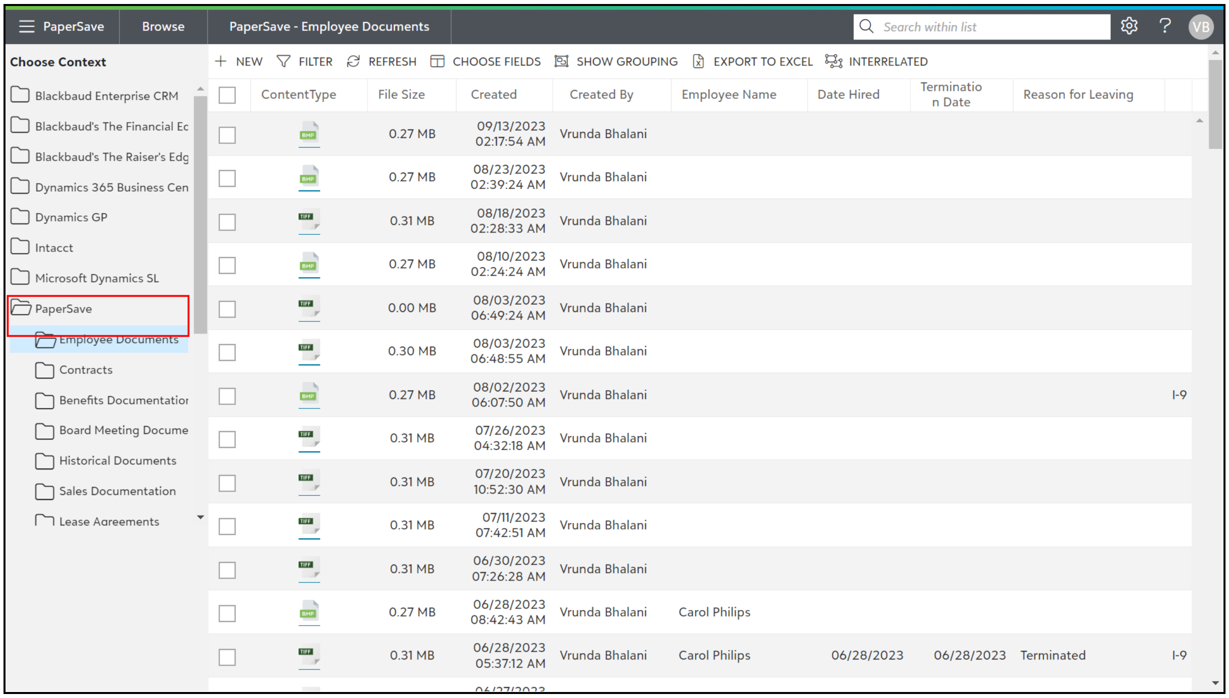
This guide contains details on all the functions and uses of the Browse Area. It is organized into sections that deeply describe options available around each major function in the Browse Area. The best place to start learning is by going through the Quick Walkthrough of the Browse Area and watching 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.

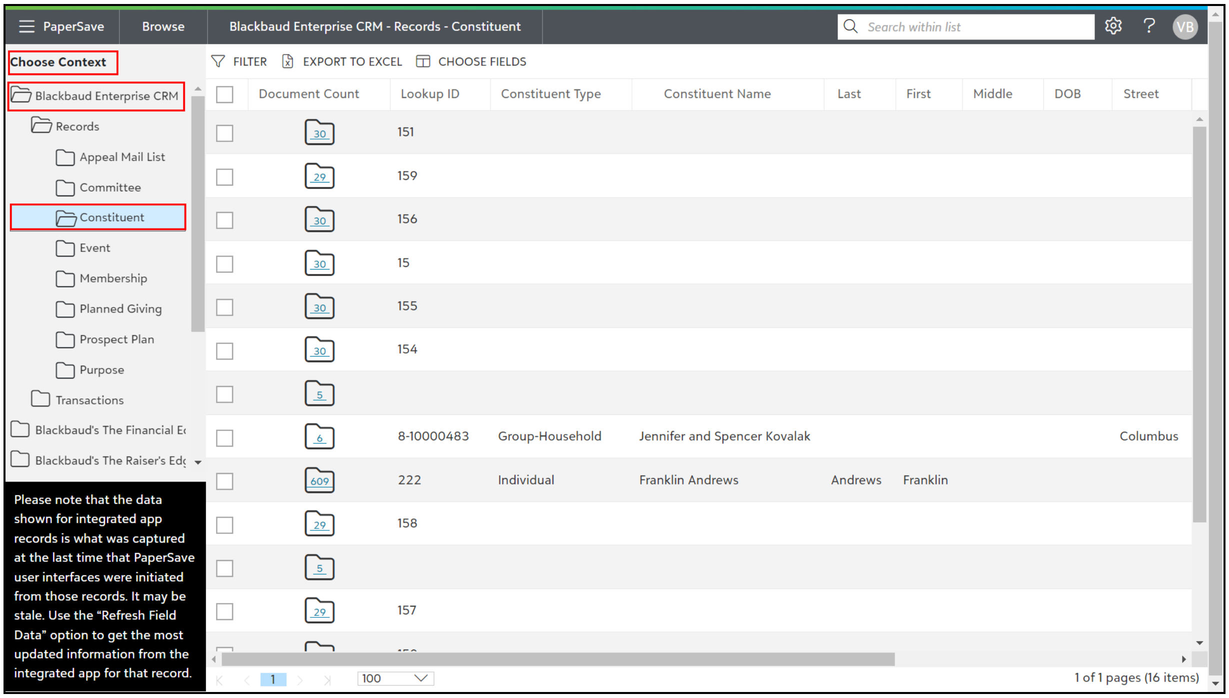
Choose Context to browse PaperSave documents

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

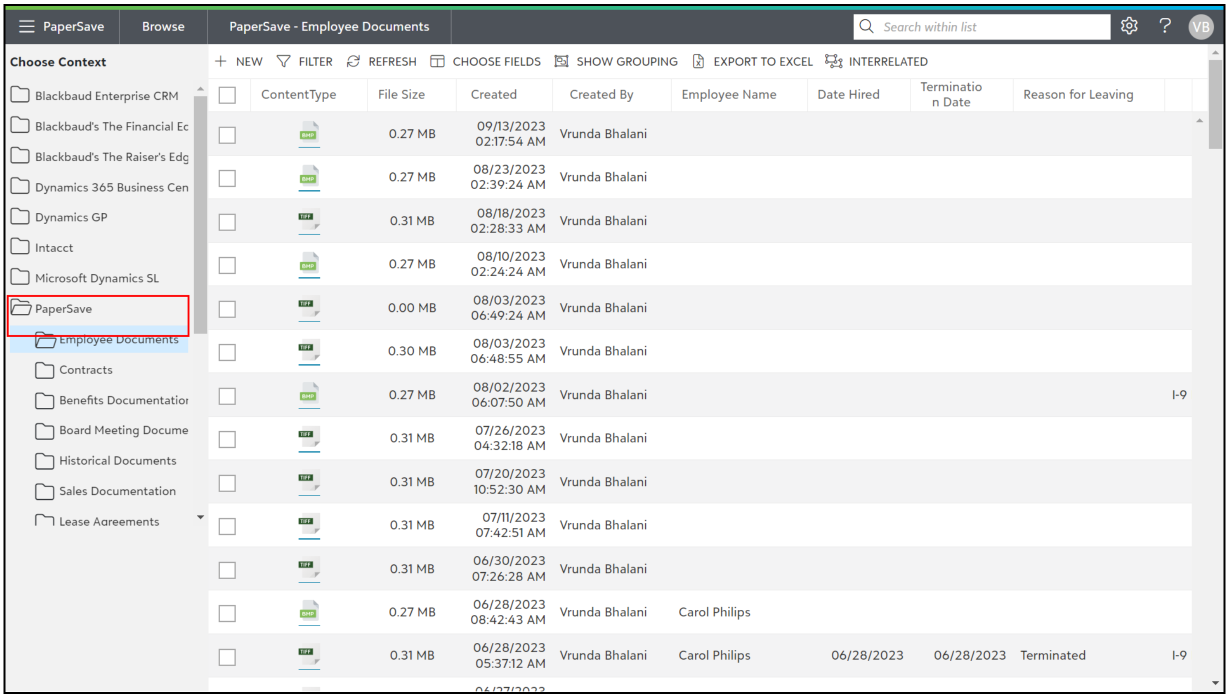
- Choose the context to browse the documents for the desired record type of an integrated application. The currently selected context is displayed in the Application bar in the format of "**Integrated App - Module - Record type**". For example - Dynamics GP - Purchasing - Purchase Order as shown below.



- 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:



For PaperSave documents, it displays the context as "**PaperSave - Document type**" in the application bar.

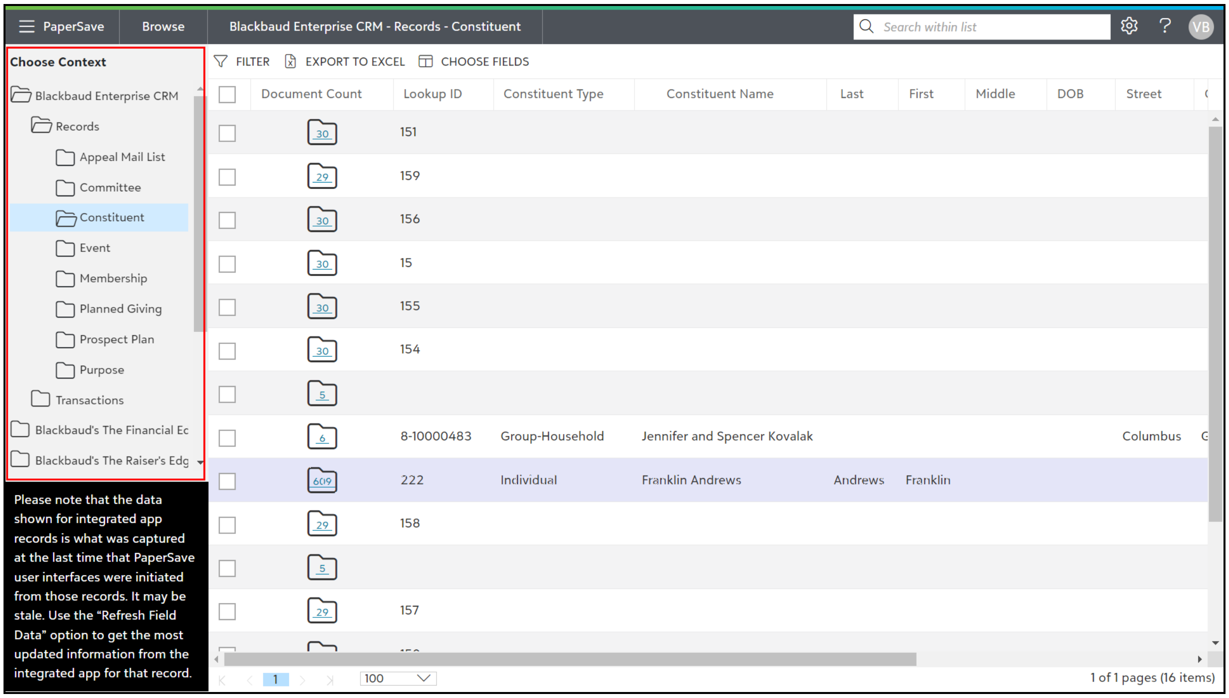
> **Note:** The Browse Area remembers and loads the previously accessed context the next time you log in to the Browse Area.

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 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

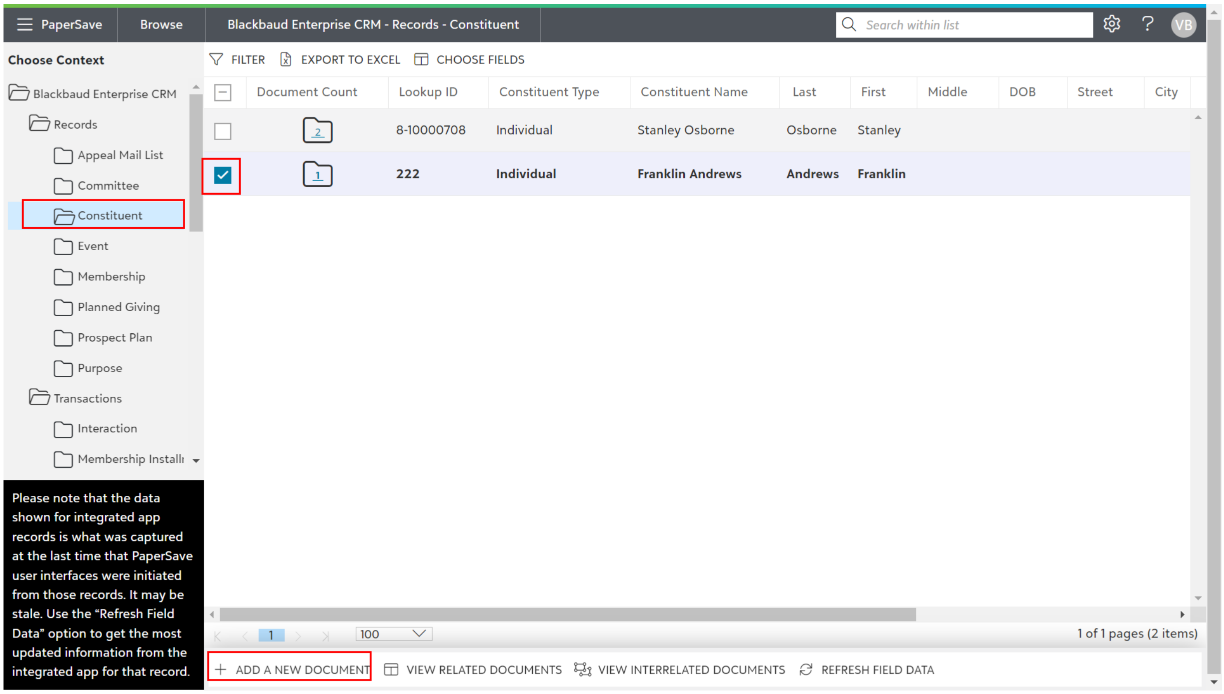
You can add new documents to an integrated app record using various file capture options such as scan documents using TWAIN compliant scanner or Fujitsu fi-NX series scanner, uploading files from your file explorer, and generate a barcode to scan the documents in a batch at a later time.

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.

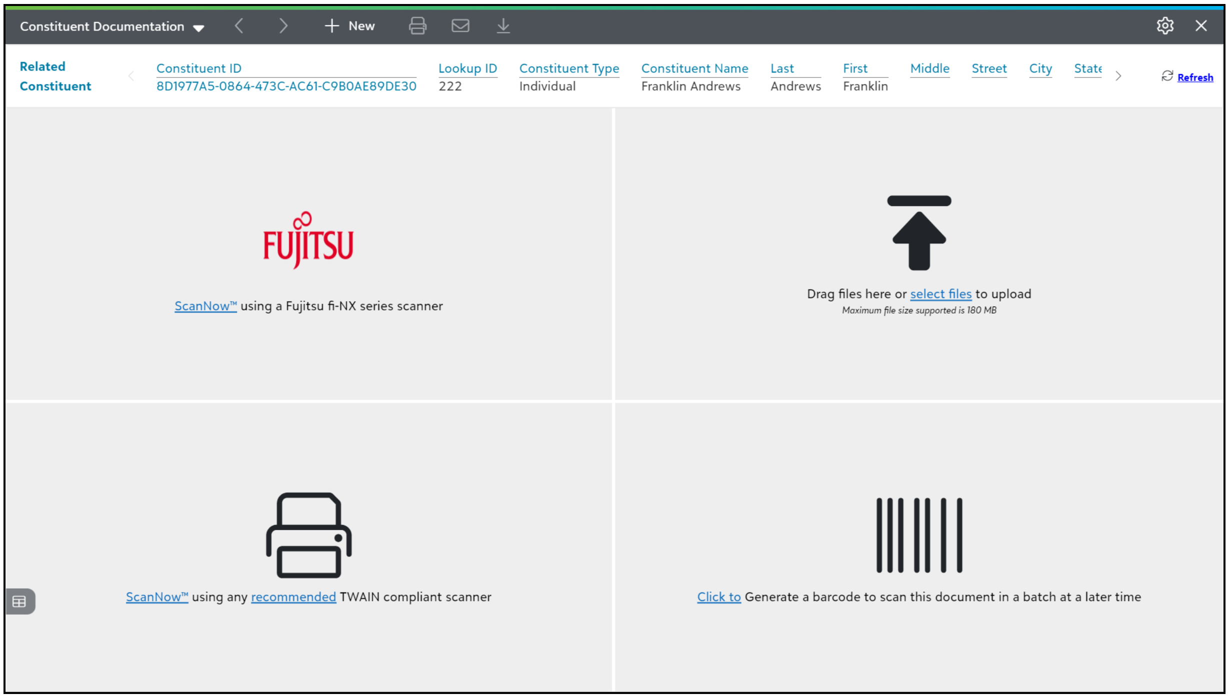


The following are the topics related to adding a new document to an integrated application record:

- 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

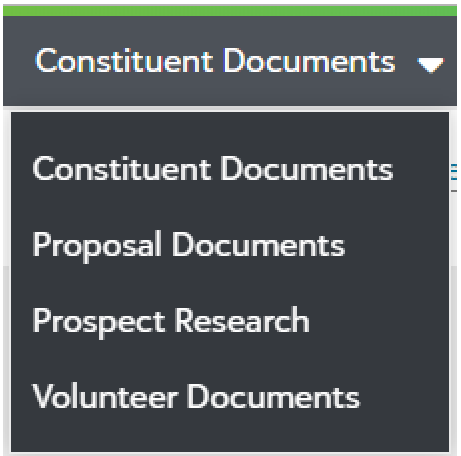
Top level toolbar in file capture options panel

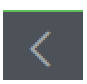
The file capture options panel has a top level toolbar in file capture options panel as shown below:

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** 

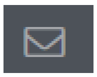
Clicking on this option will navigate you to the previous document in the unsubmitted item list.

- **NEW** 

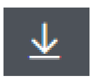
This option switches to the file capture options panel.

- **Print** 

This option lets you print the selected document from the unsubmitted view.

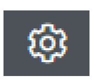
- **Email** 

This option lets you send the selected document via email.

- **Download** 

This option lets you download a copy of the current document.

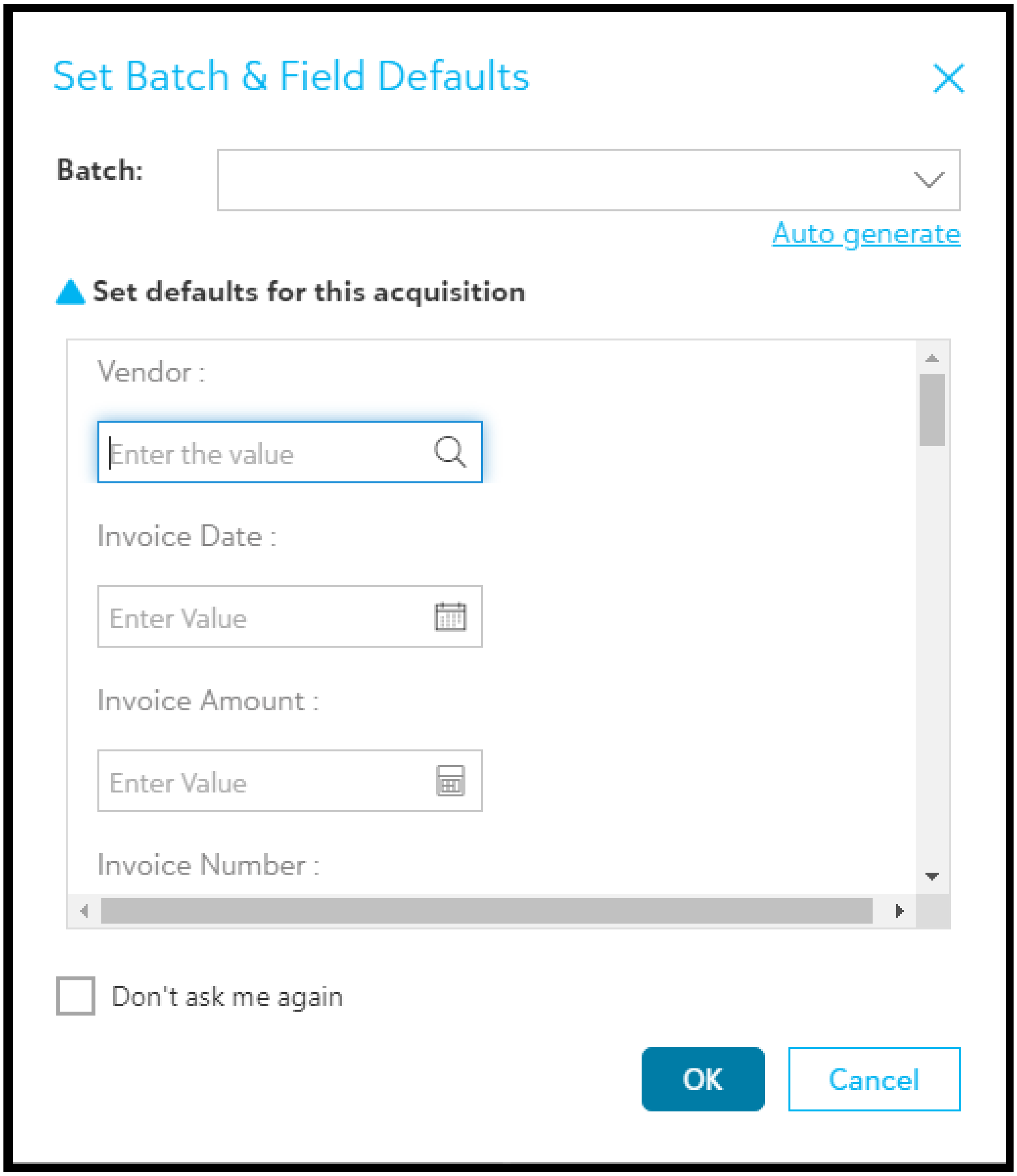
Settings panel

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, ¿, ¡
>
> French characters to be considered:
> - ë, ï, ü, à, è, ù, â, ê, î, ô, û, é, Ç

Setting defaults for this Acquisition

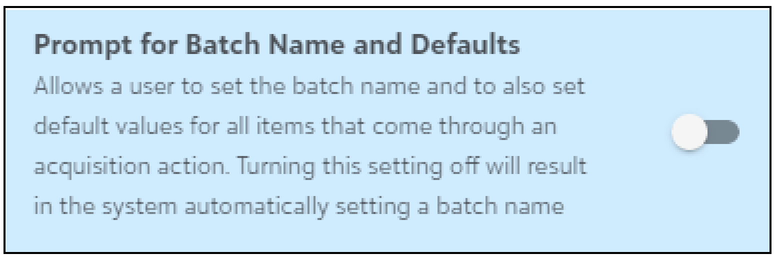
You can set default values for Profile fields on single or group of items that you acquire.

> **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.

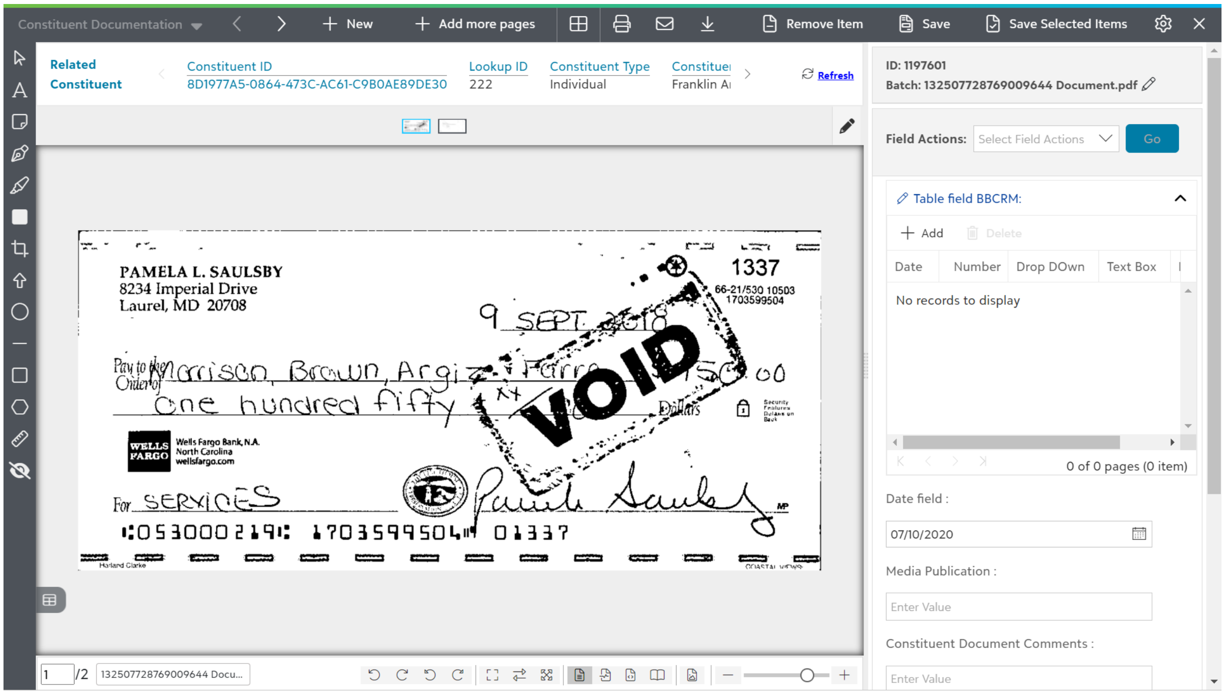


Validating the document in item viewer

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.



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.

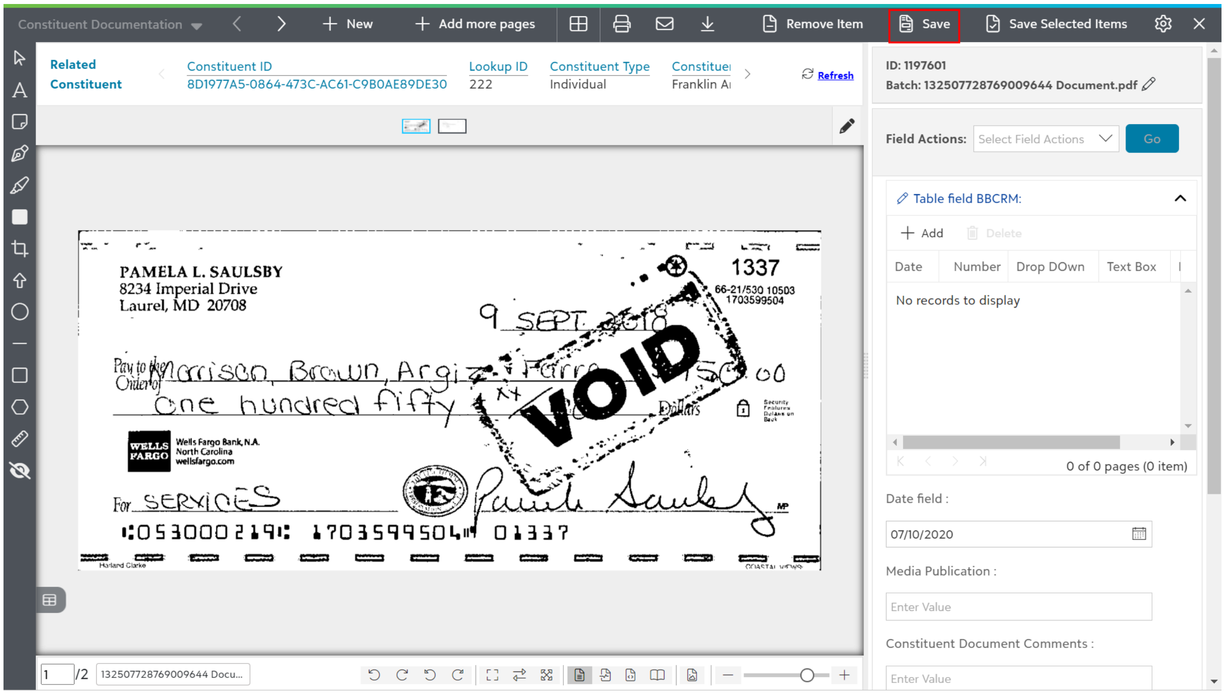
Saving the document to an Integrated App record

You can save the document to the Integrated App record once you are done validating the document.

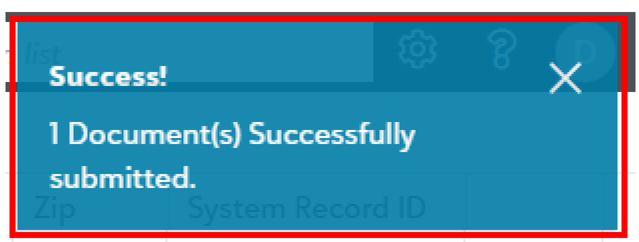
Watch the video explains to learn how to save an acquired document in the Search Area.

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.

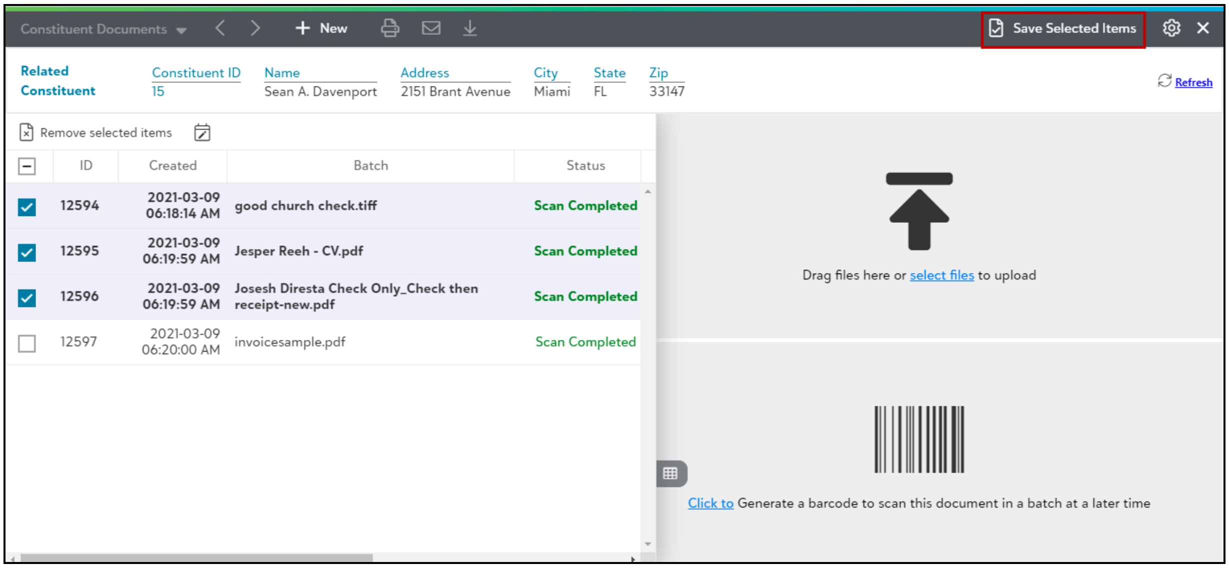


Save Multiple documents

Follow the below steps to Save multiple unsubmitted documents to an Integrated App record.

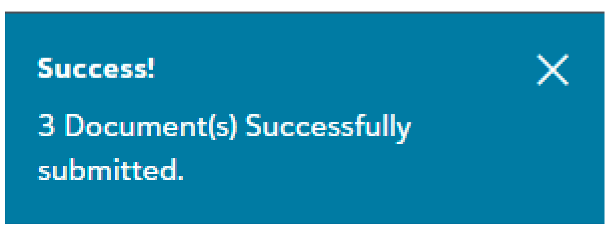
1) Open the Unsubmitted item list to access the items.

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

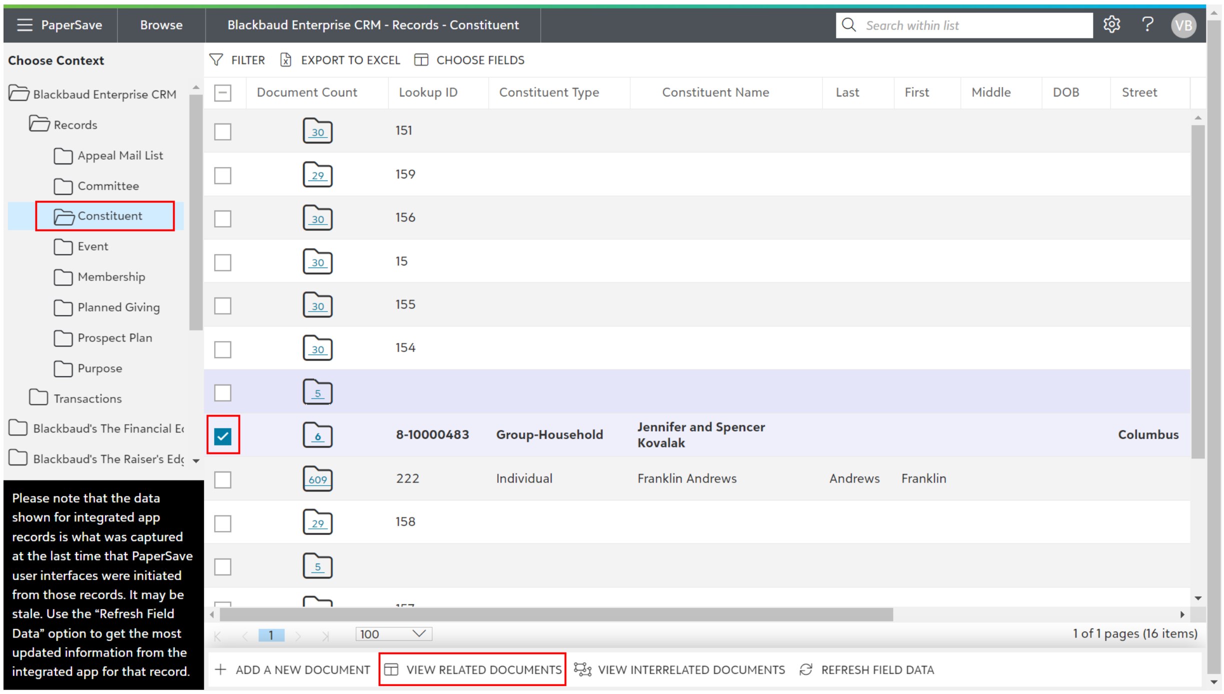
You can view the documents that are associated to any instance of type of record in an integrated application that PaperSave is integrated into. Follow the below steps to view the related documents for an integrated app record:

1) **Choose** the **context** from the tree view for the desired record type in an integrated application.

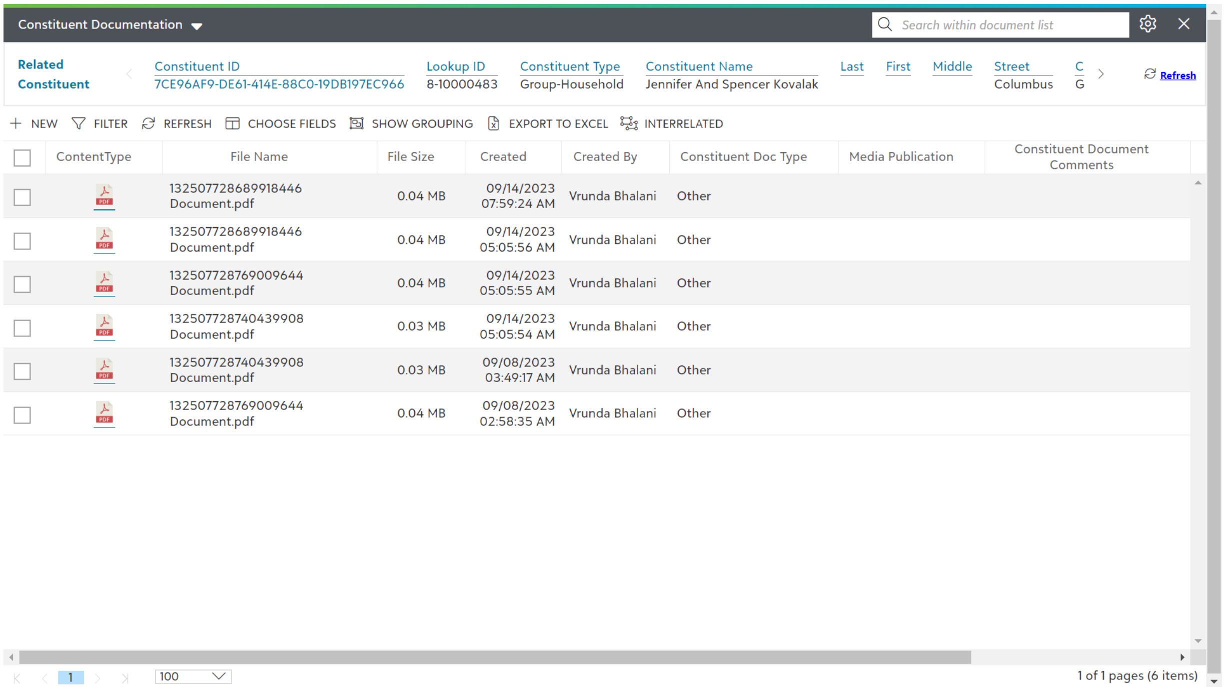
2) **Select** one or more **records** for which you wish to see the related documents.

3) A record list slide up panel will pop-up in the bottom of screen.

4) Click on "**VIEW RELATED DOCUMENTS**", as shown below.



- You can view the list of related documents for the selected records, as shown below.



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.

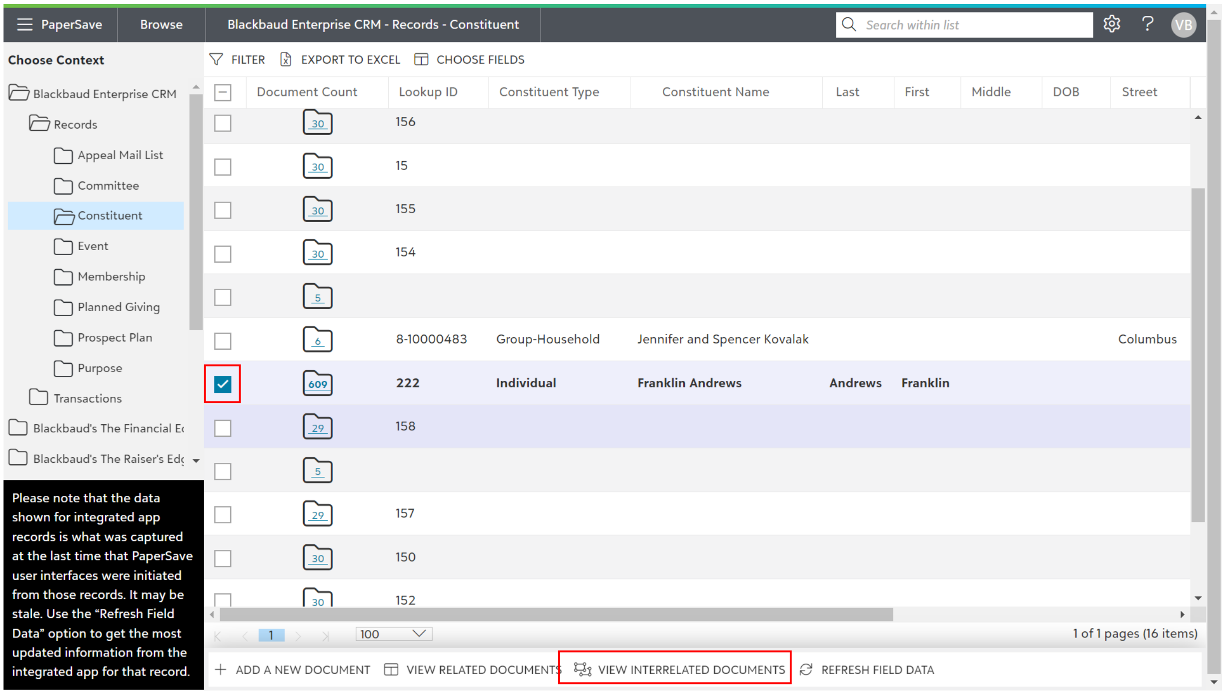
Follow the below steps to view the interrelated documents for an integrated app record:

1) **Choose** the **context** from the tree view for the desired record type in an integrated application.

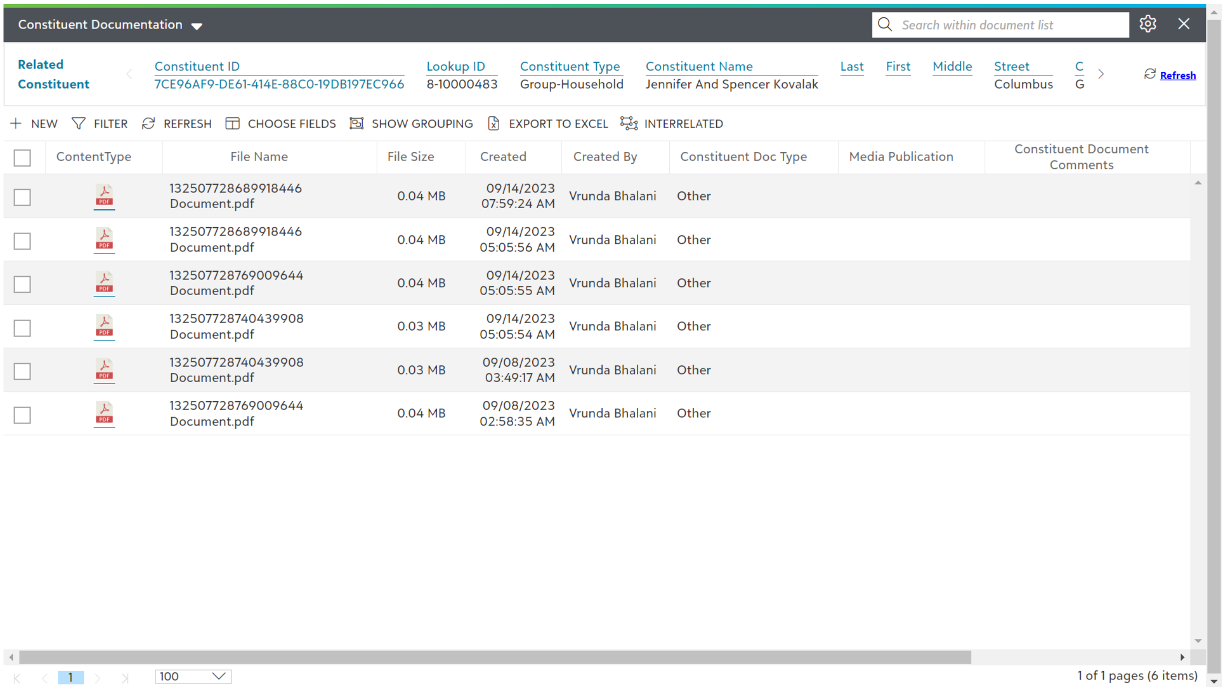
2) **Select** the **record** for which you wish to see the inter-related documents.

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.



5) It will display the list of interrelated documents for the selected record, as shown below.



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

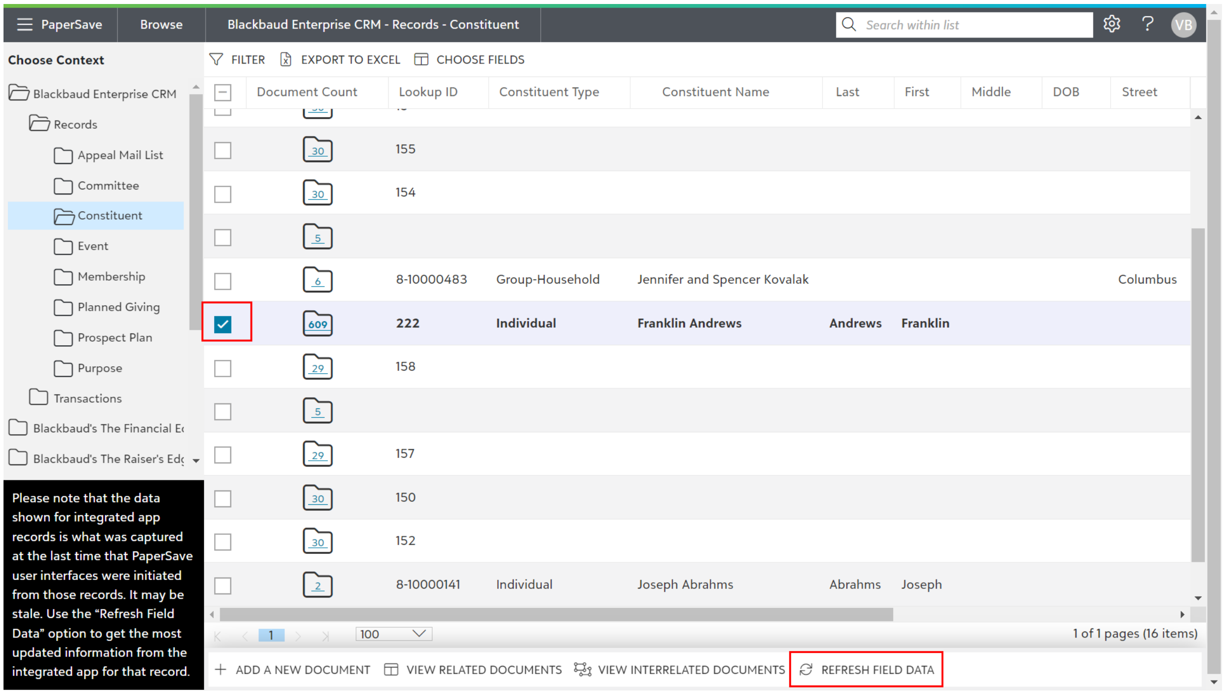
The Integrated record list shows the record field values captured at the time of associating PaperSave document to an integrated application record. Now, it is possible that the record field values have changed later directly from the Integrated application. In such cases, you will require the most updated 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:

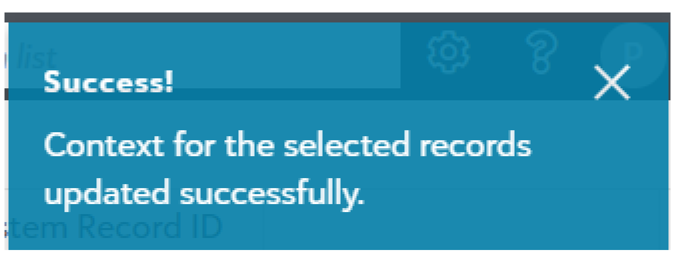
1) **Select** the desired records from the list for which you want the latest field values.

2) A slide up toolbar will pop-up from the bottom of the screen.

3) Click on "**REFRESH FIELD DATA**" option, as shown below.



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**".

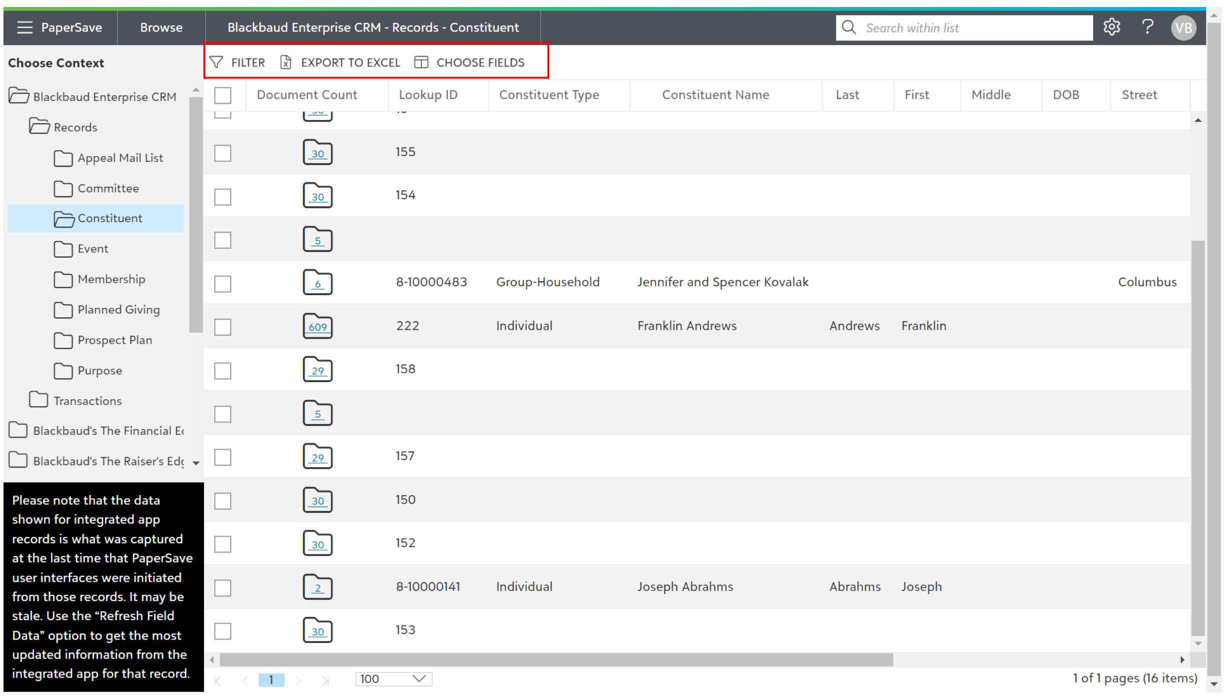


5) Similarly, it will display a notification "**Failure! There was an error while updating the context for the selected records updated. Please try again.**" in case of the failure to update the field data for the selected records.

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 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.

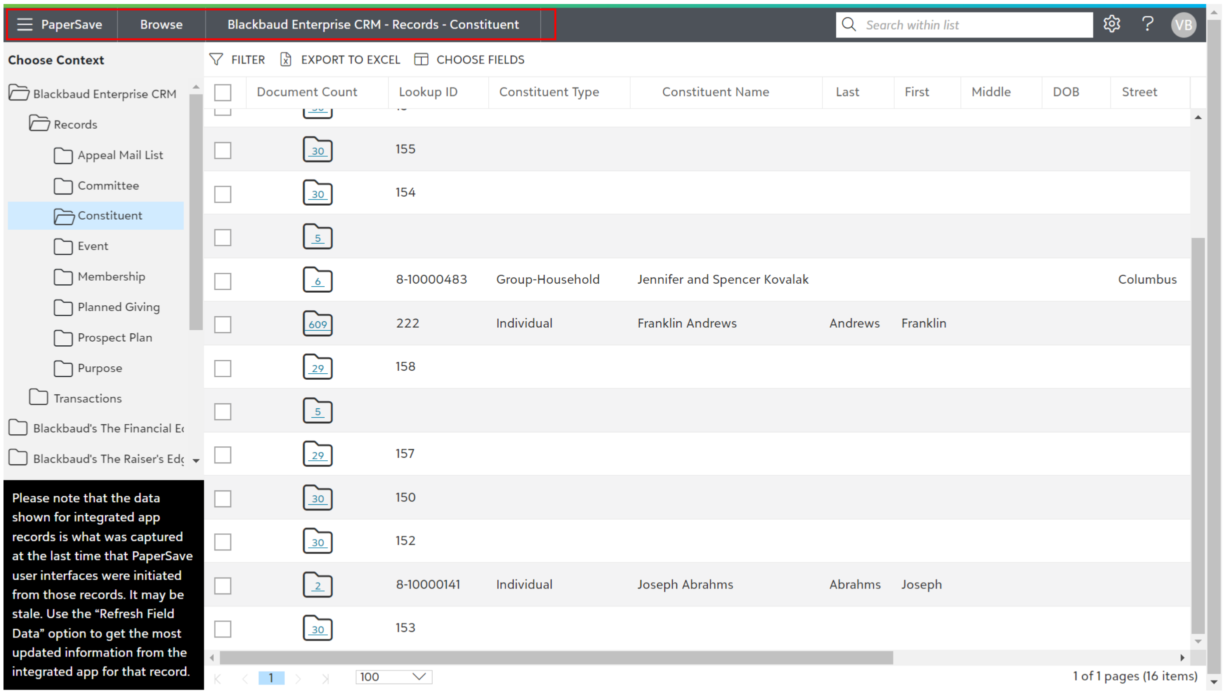
- **CHOOSE FIELDS**

  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 following is a description of each option in the Browse Area Application bar:

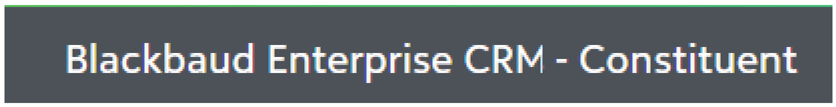
1) **NAVIGATION MENU**

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.

If the Integrated application does not contain any module, then it shall display Context in the format of "**Integrated App - Record Type**".



Similarly, if the Context is selected for PaperSave (non-integrated application), then it shall display "**PaperSave - Document Type**".

3) **INTEGRATED APPLICATION INSATANCE**

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.

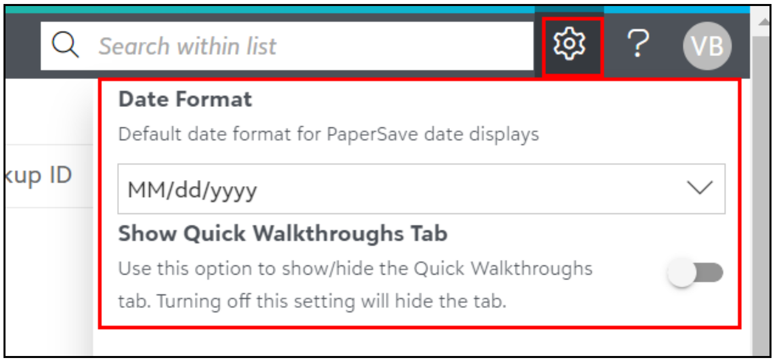
> **Note:** If there is only one registered instance, then no instance name will appear in the application bar.

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/dd/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.

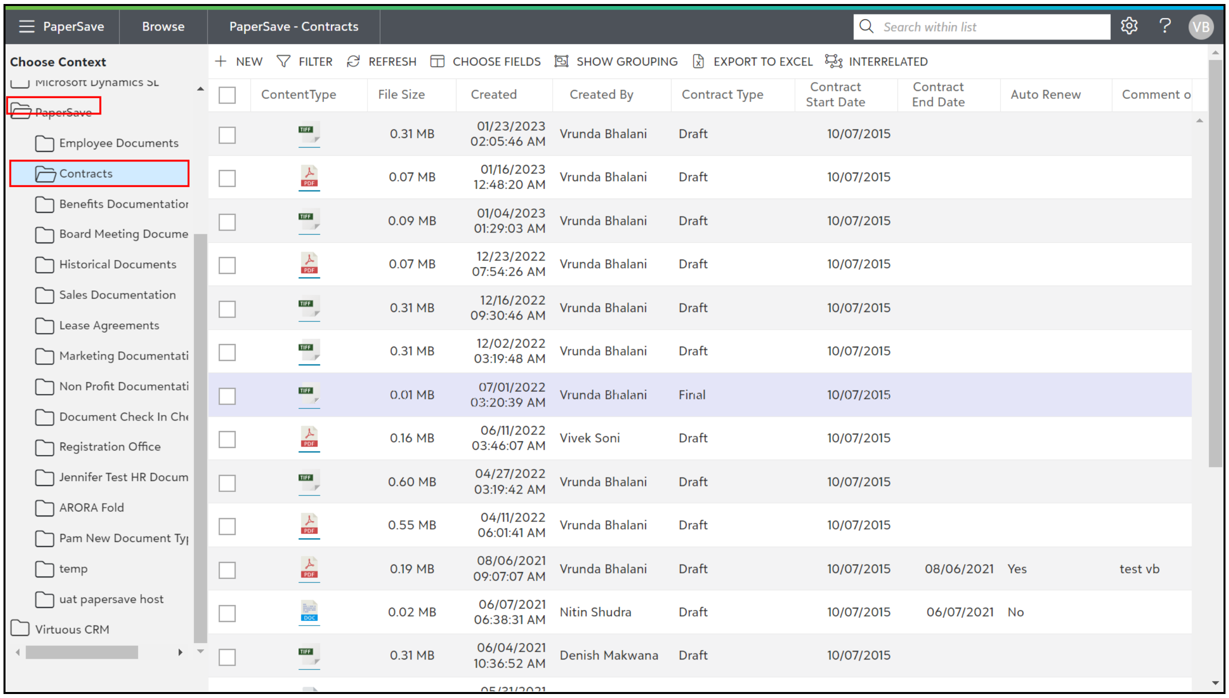
Watch the video to learn about the User profile in Browse Area.

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:



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 saves 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:

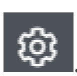
- Integrated Application Record Information
- Profile field values based on Workflow and Document Type
- Content that is within the body of the document

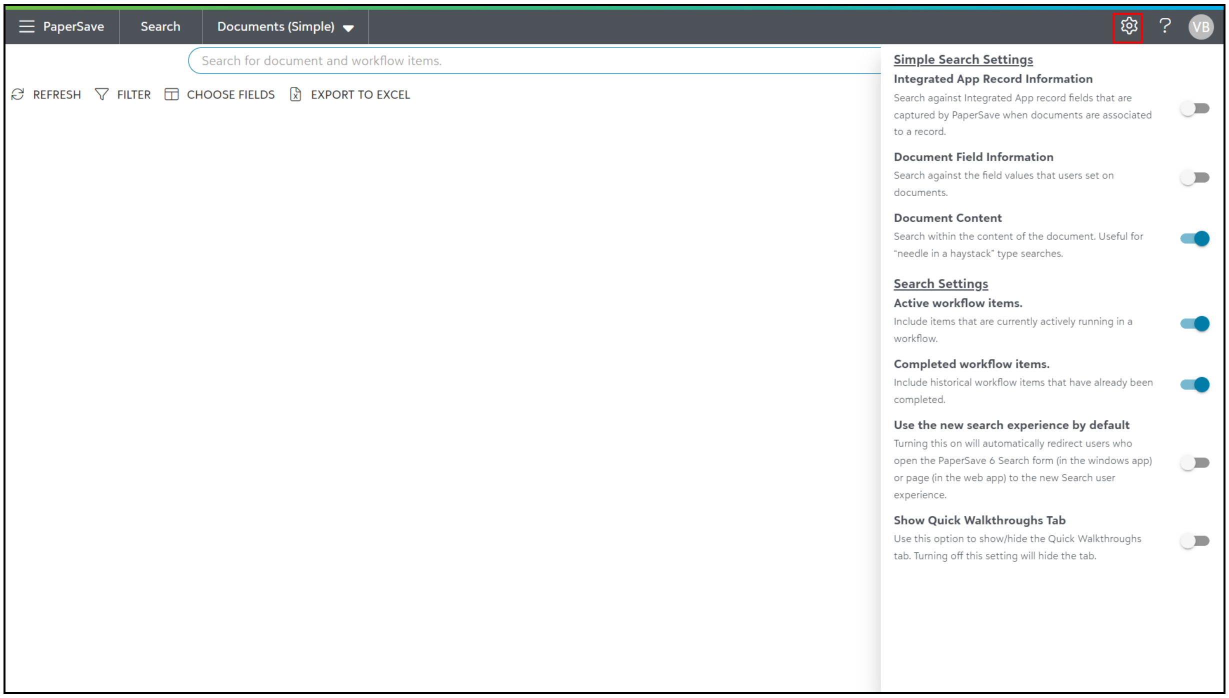
Watch the video to learn about finding the documents using Simple Search.

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**

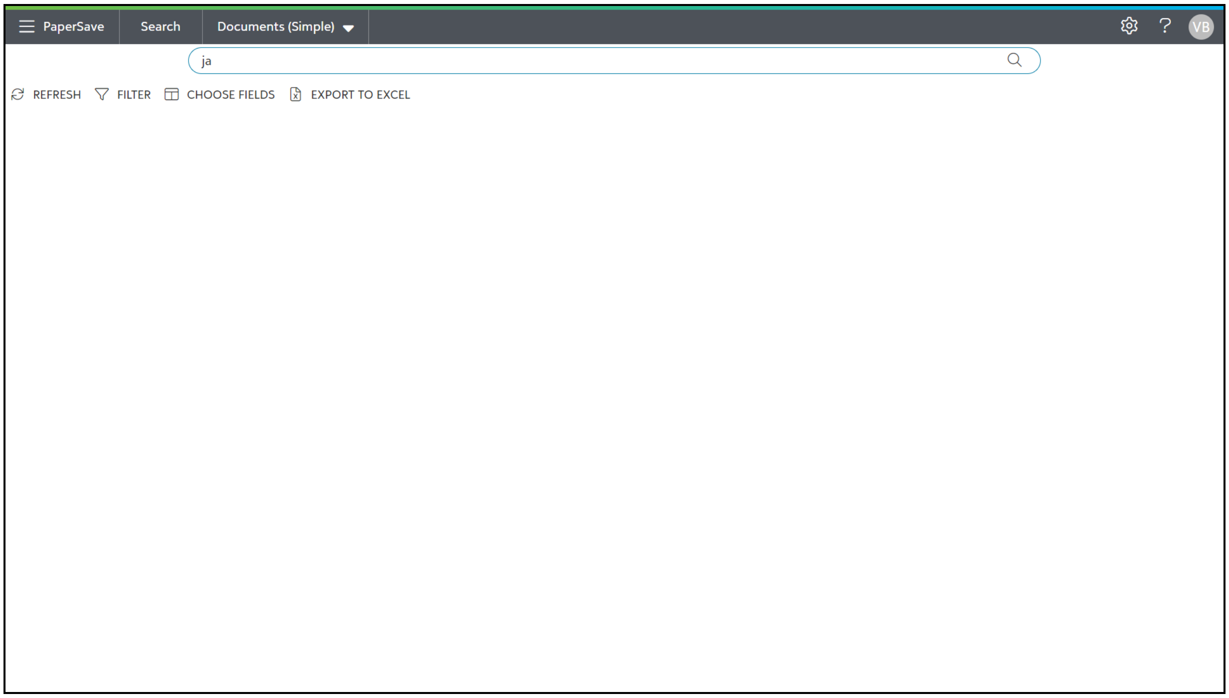
Turn on this option to show/hide the Quick Walkthroughs tab. Turning off this setting will hide the tab.

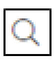
Performing Simple Search

When you navigate to the Search Area, Documents (Simple) is loaded by default. Follow the below steps to perform a simple search:

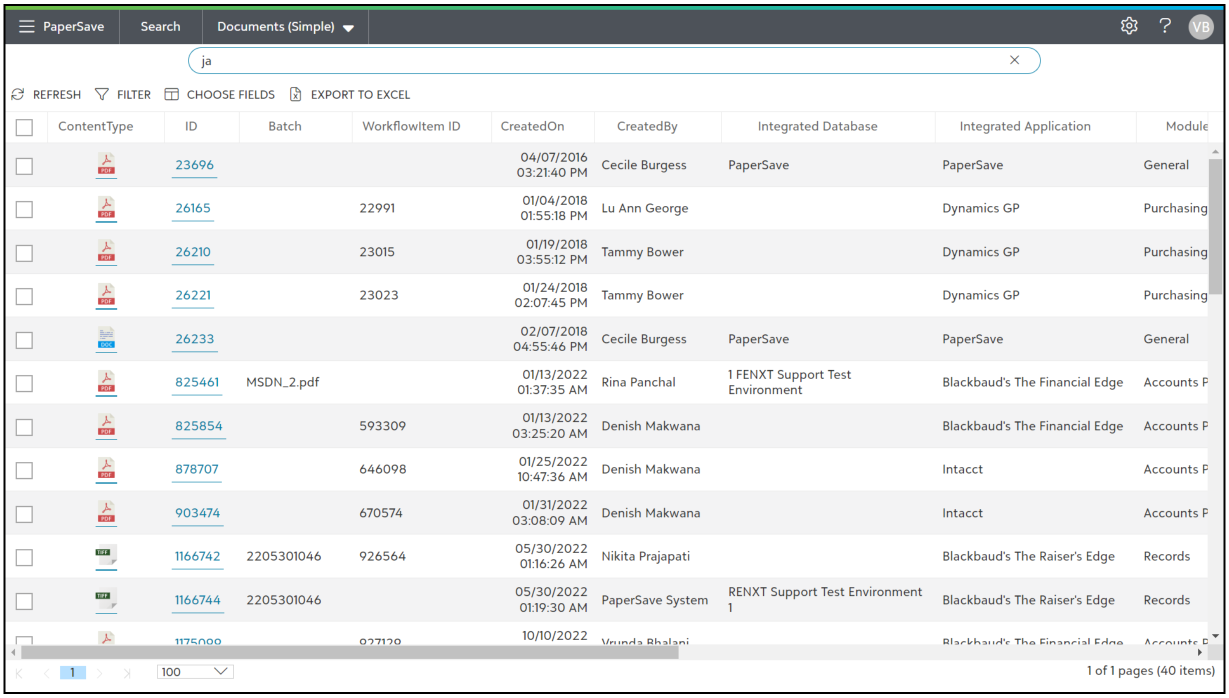
1) Ensure that you have set your desired preferences in the Settings panel underneath the gear icon. Refer to this section to learn more about simple search settings.

2) **Enter** the desired keyword in the search box.

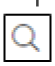


3) Click on search  icon or press enter to see the results.

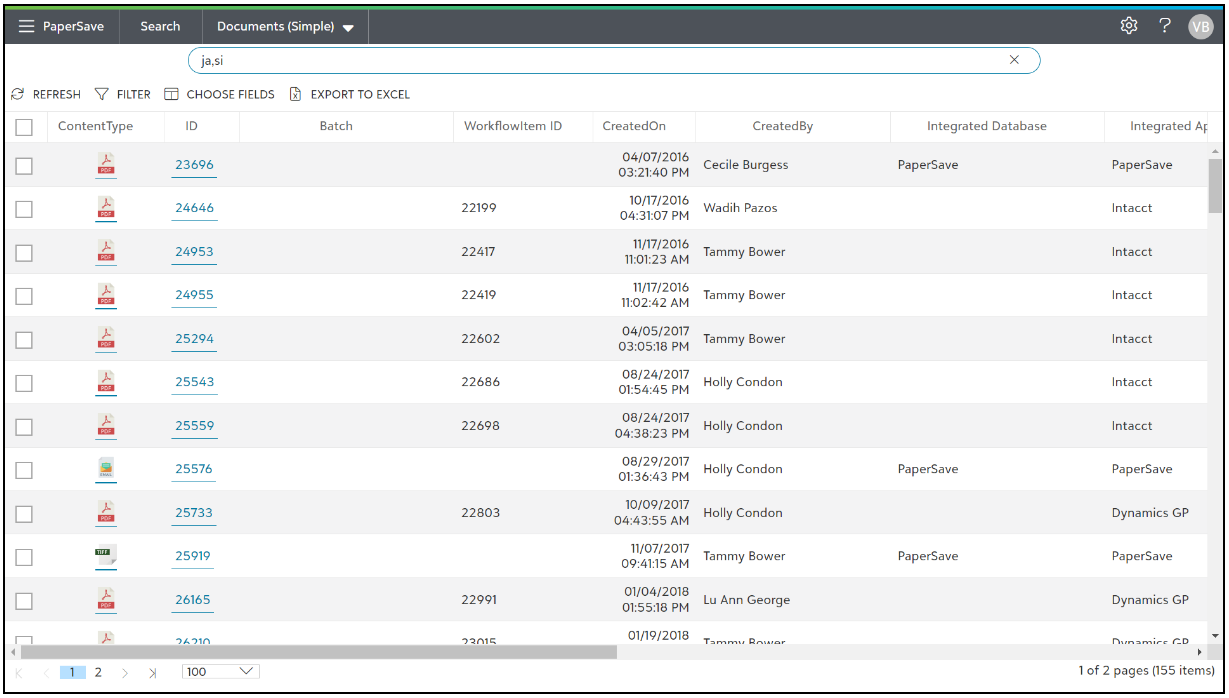
4) The search result will show a list of documents or Workflow items based on the entered keyword(s), as shown below:



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.

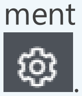


It is also possible to search within the document's content by enabling the "**Document Content**" option from the settings panel. Learn more about Content Search.

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. .

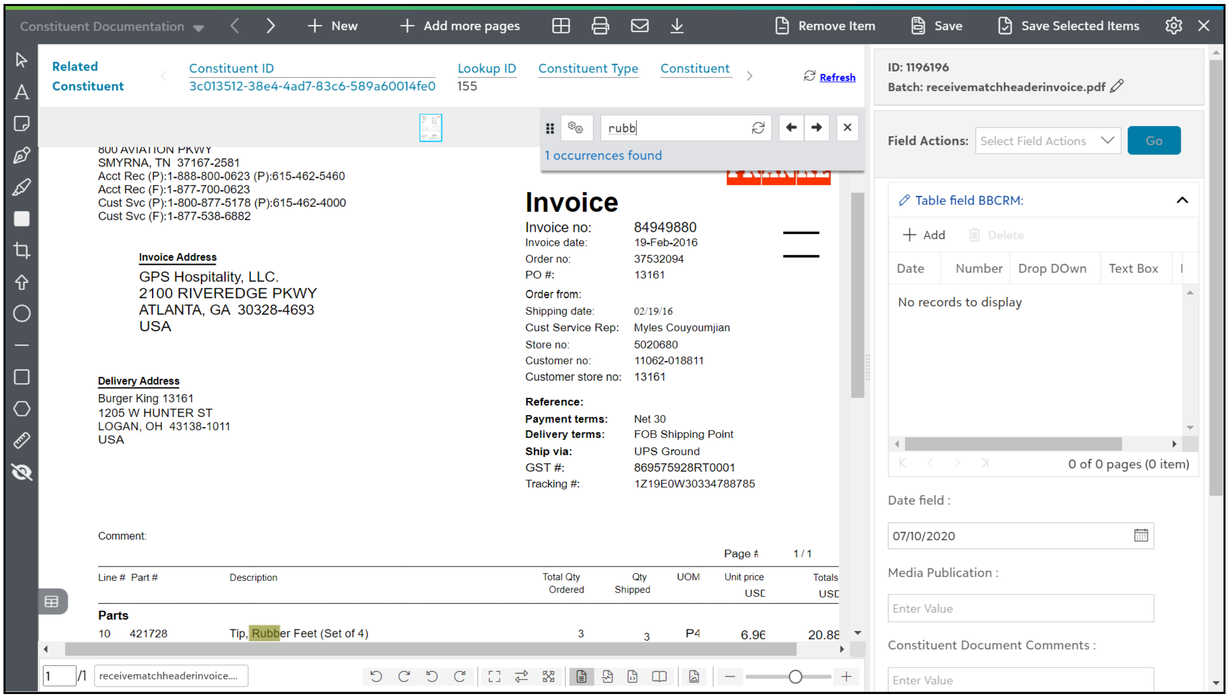
1) **Enter** the keyword(s) that you wish to find within the document in the search bar.

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) **without double quotes** and click on the **Search** icon or press **Enter**.	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) **with double quotes** and click on the **Search** icon or press **Enter**. For Example, "bill"	It displays a list of documents with content that matches the keyword(s) only.

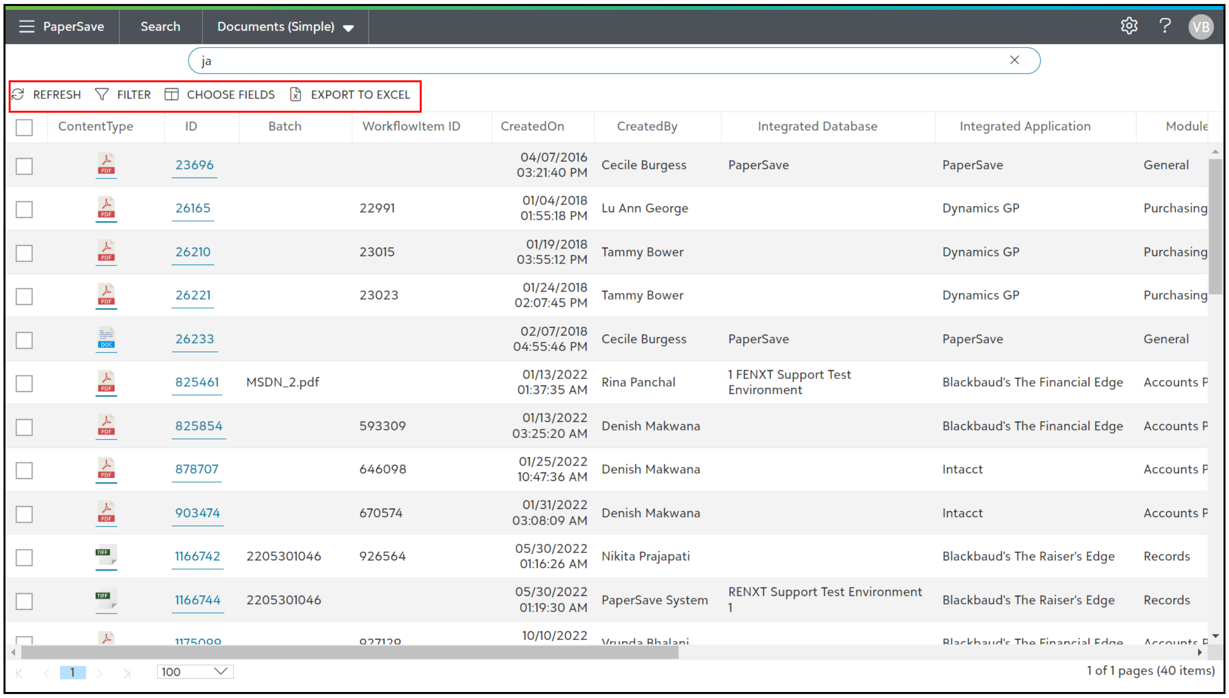
Tip: Enter multiple keywords separated by comma (For Example, **part, rubber**) in the search box and press Enter or click on the search icon to perform a content search with multiple keywords.

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:



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**.

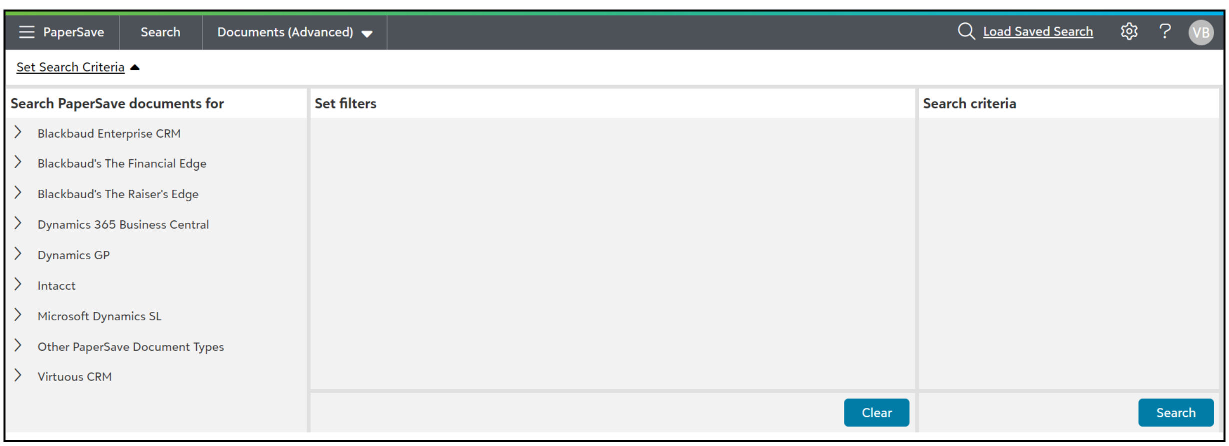
- **EXPORT TO EXCEL**

  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.



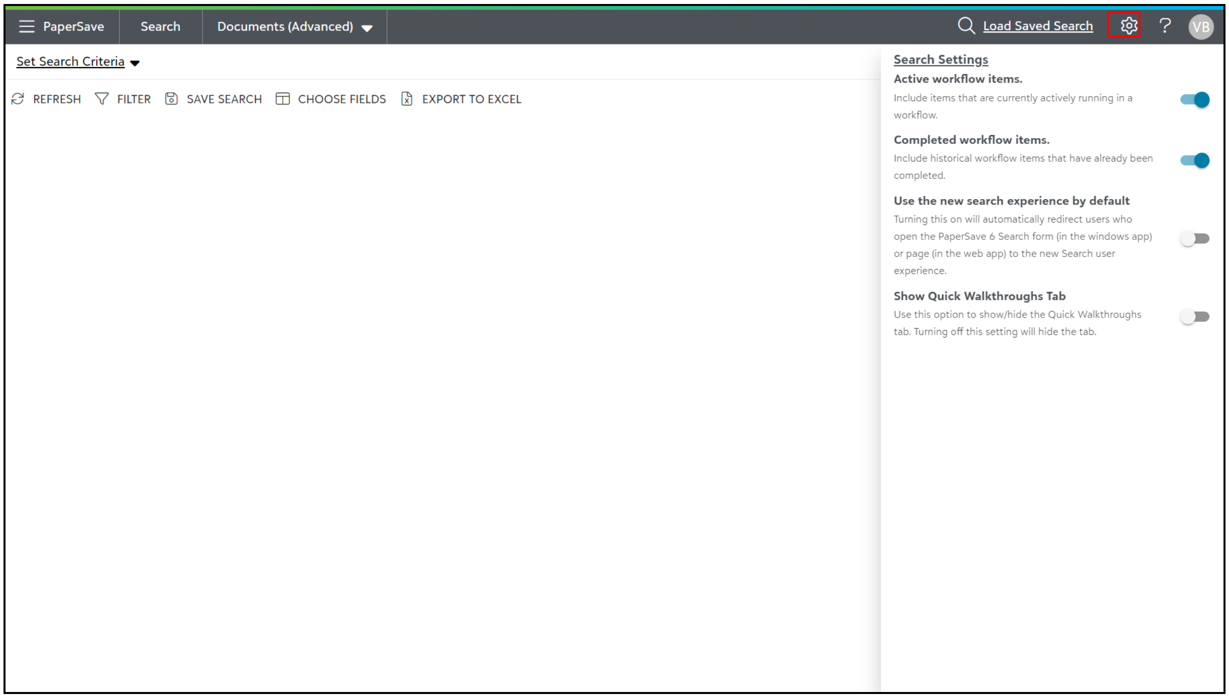
Watch the video to learn about how to find documents using Documents(Advanced) in the Search Area.

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.

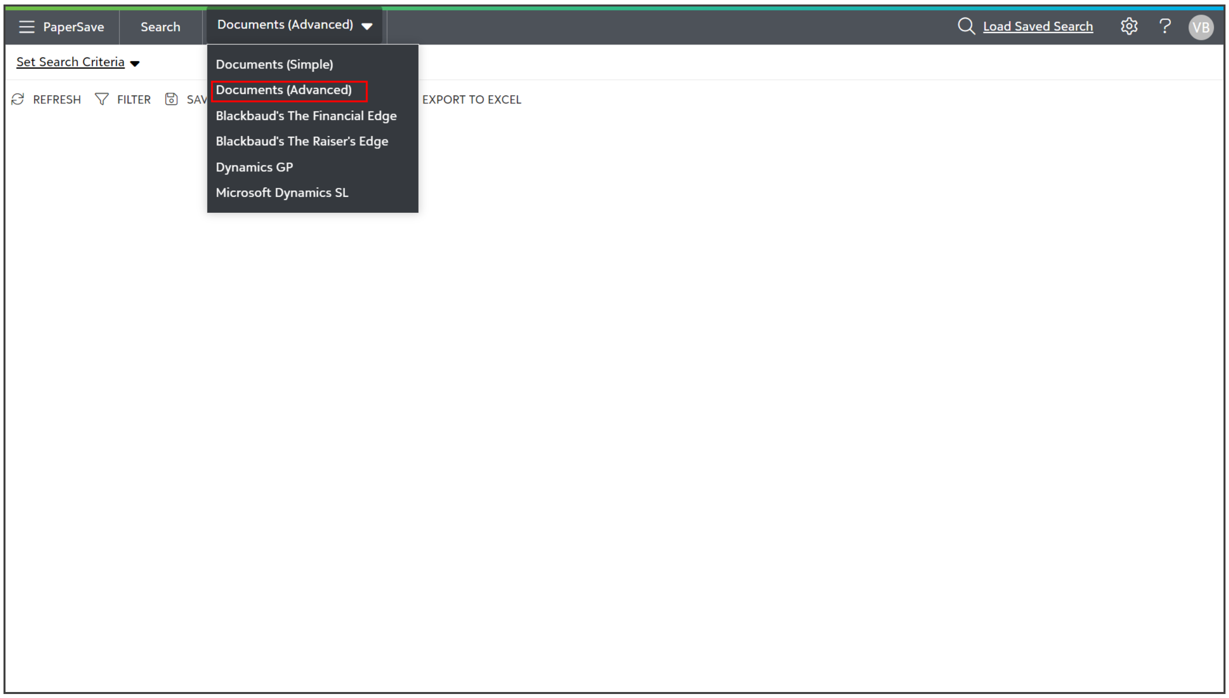
Performing Advanced Search

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.

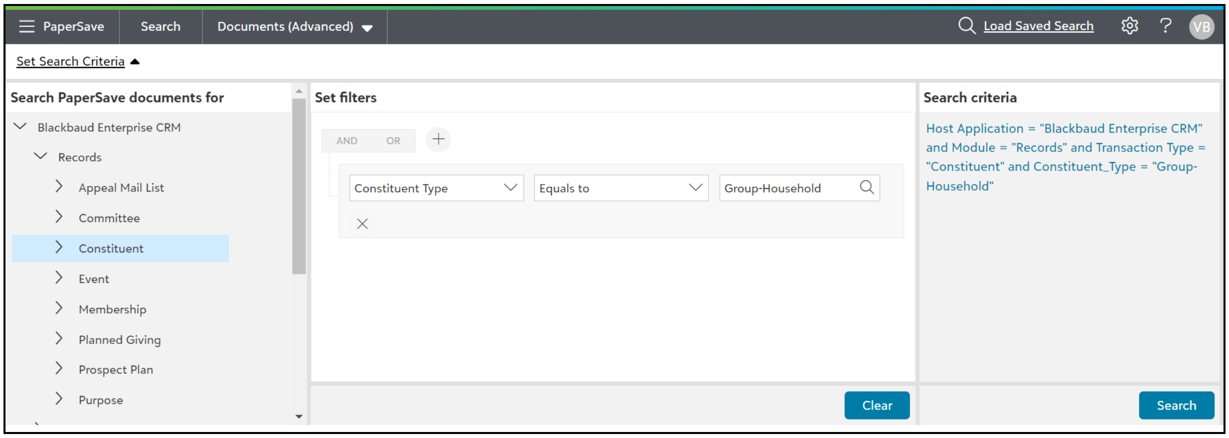


3) You can select the Module, Record Type and Document Type from the context menu on the lefty by clicking on the > arrow to expand the selection. Lets say for example ,you select Dynamics 365 Finance > Account Payable > Vendor > Venodr documentation from the context menu.

> **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.

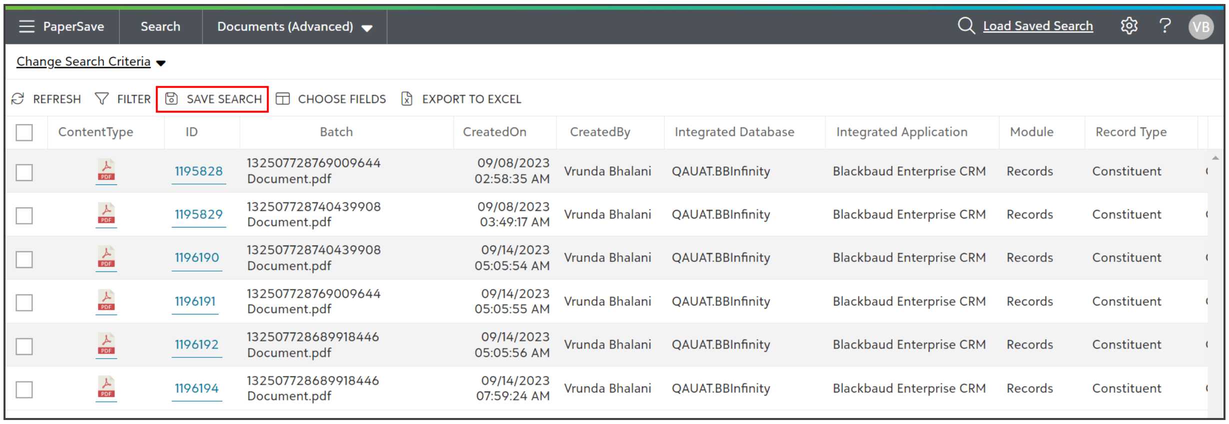
Watch the video to learn about the Saved Search feature in Advance Search.

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

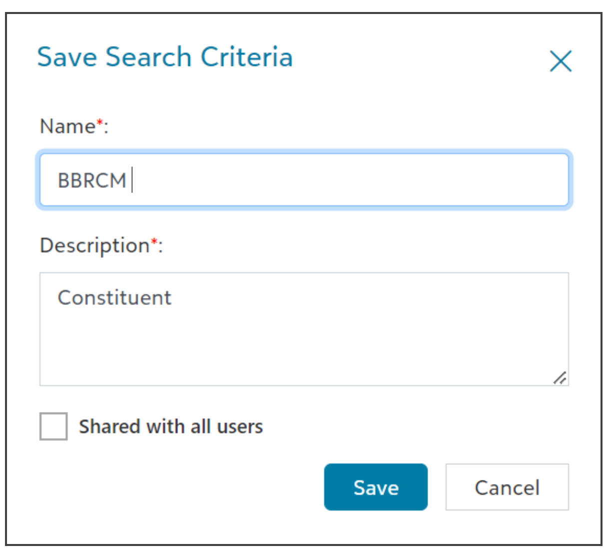
1) To save the search criteria, click on the “**Save Search**” option from the list toolbar, as shown below.



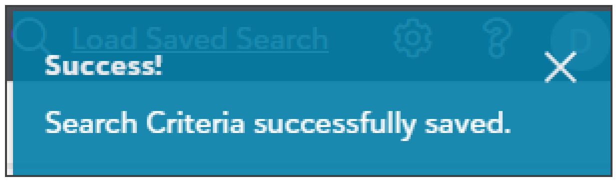
2) When you click on the “Save Search” option, a dialog box will pop-up where you need to enter a name and description for the saved query.

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.

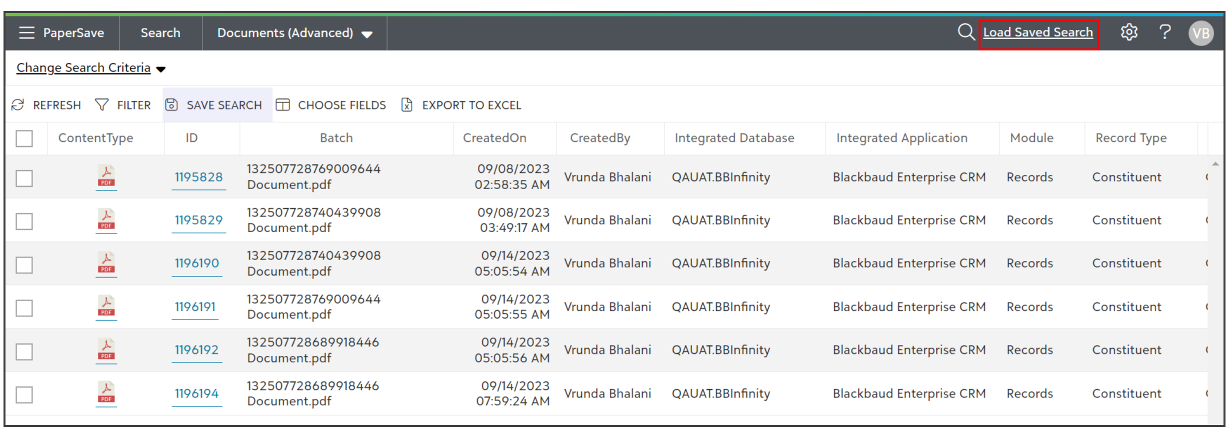


4) Once you enter the Master password, your query will be saved and available for all PaperSave users, as shown below.

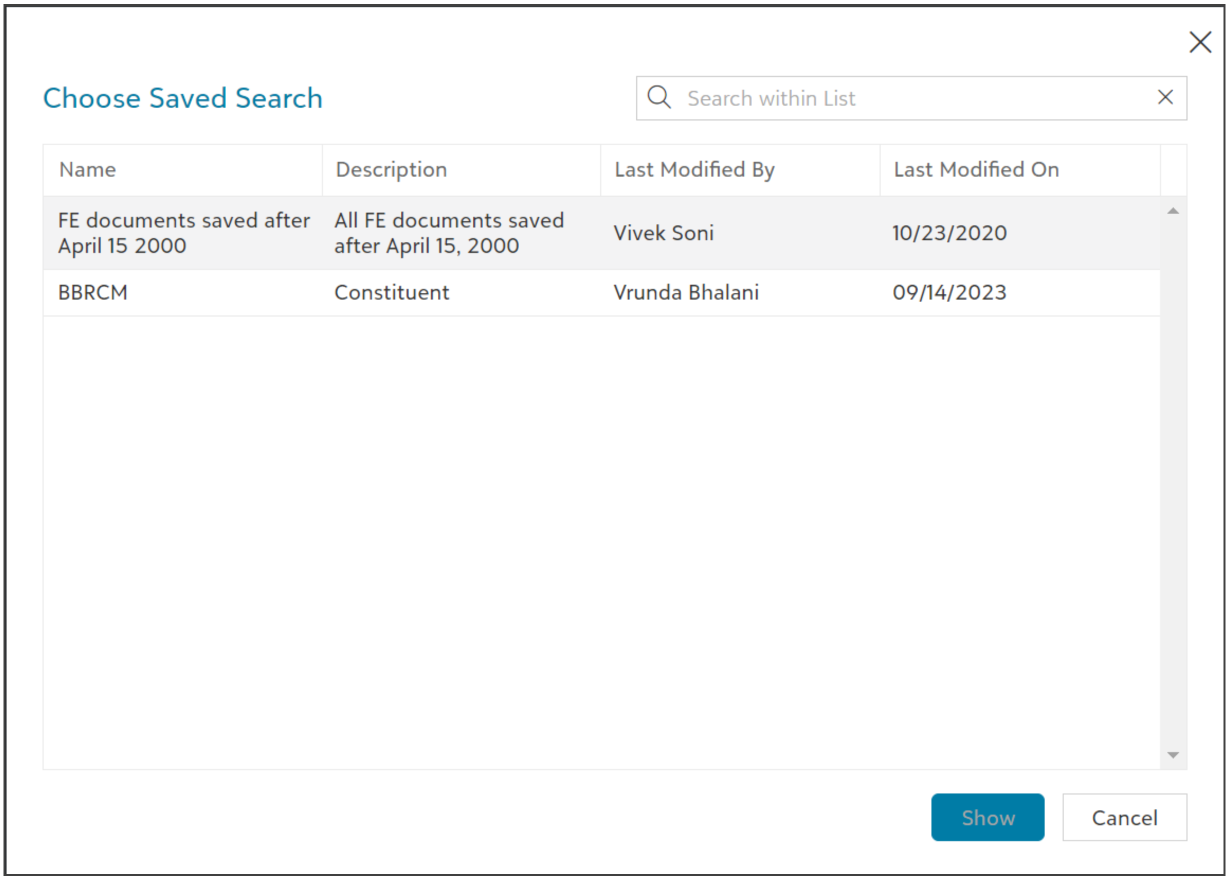


Loading saved search queries

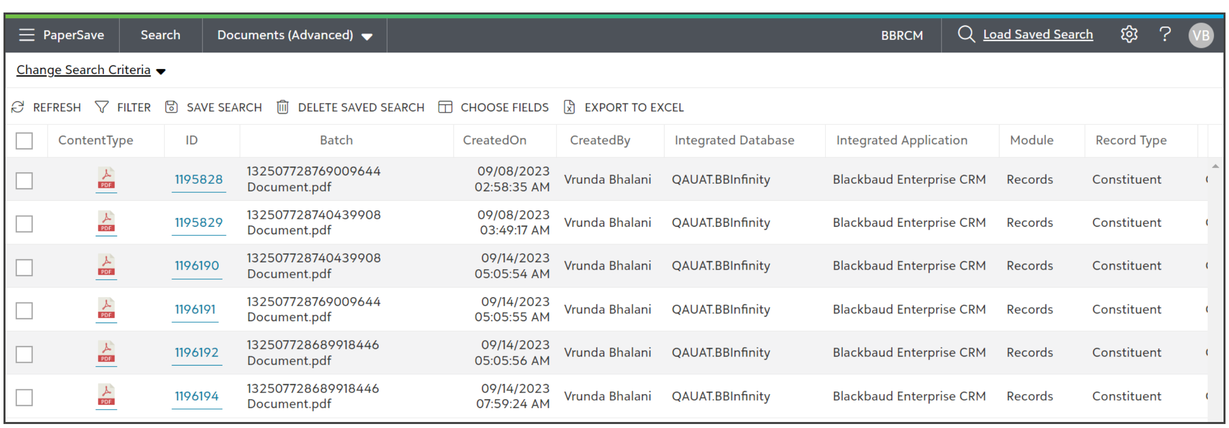
1) To run your saved queries, click on “**Load Saved Search**” option present on the application bar, as shown below.



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.



3) As shown in the below screen, you will get the current results of your saved query.

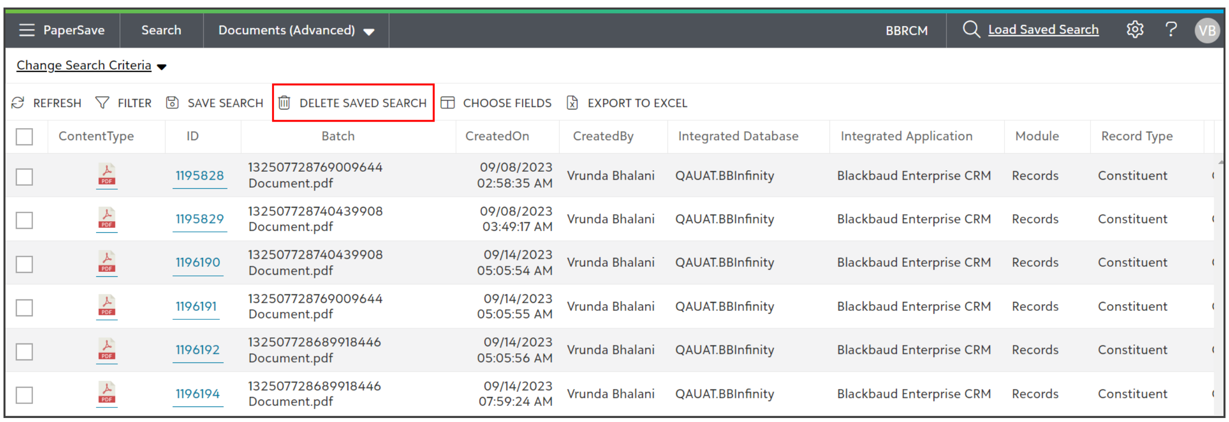


Deleting saved search queries

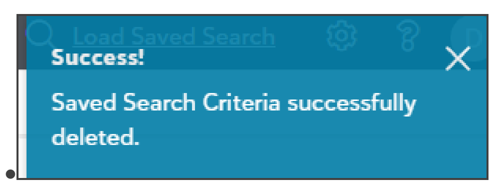
1) To remove the unwanted saved search criteria, you can click on the "**Delete Saved Search**" from the list toolbar. This option will be shown in the list toolbar after you have loaded a saved search.

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.

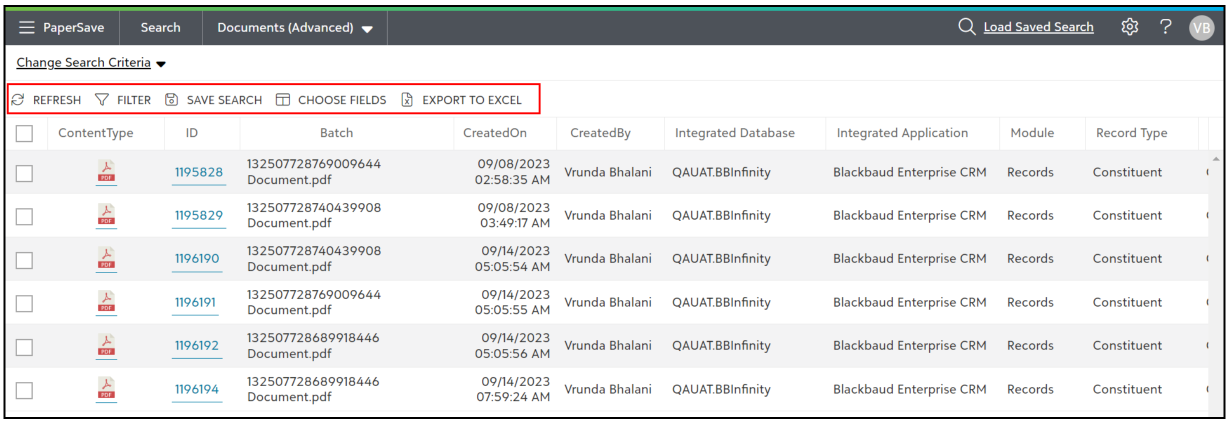


3) You will receive a confirmation message that the saved search was deleted, as shown below.



Advanced Search list toolbar

The Search Area offers a list toolbar for the Advanced Search, as shown below.



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

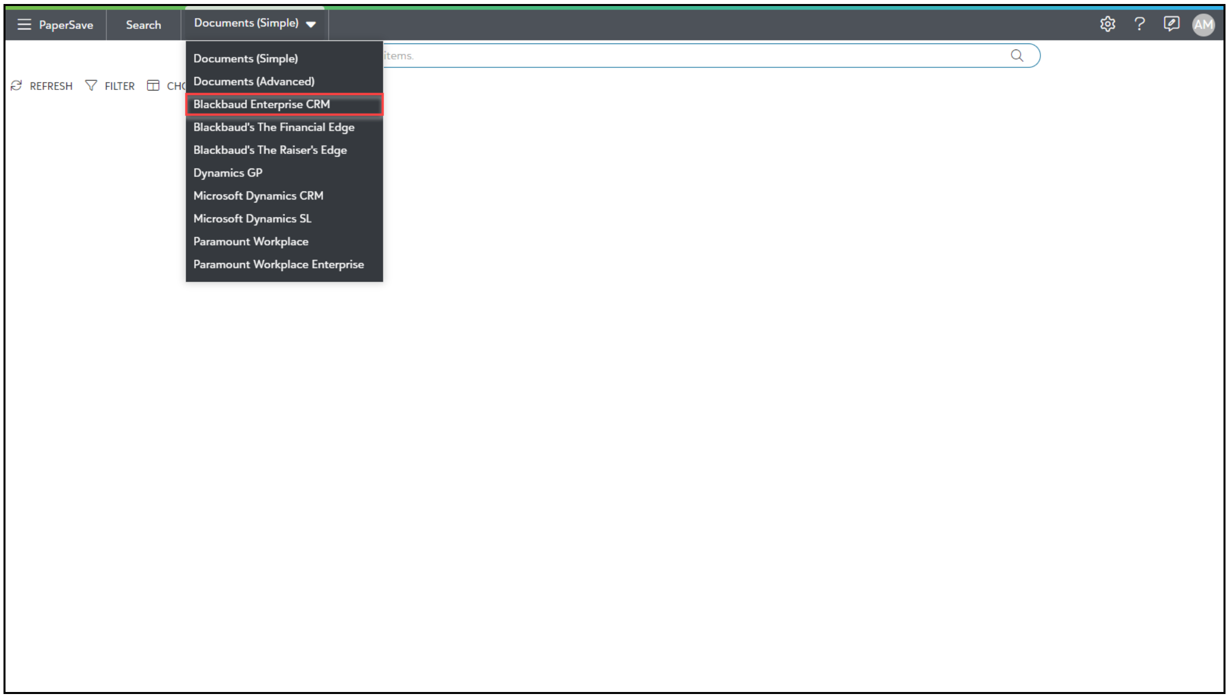
Search Area facilitates you to search for records of an Integrated application i.e. Blackbaud CRM for desired Instance, view the documents associated with one or more records, and add new documents to one or more Integrated App records using available File capture options.

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

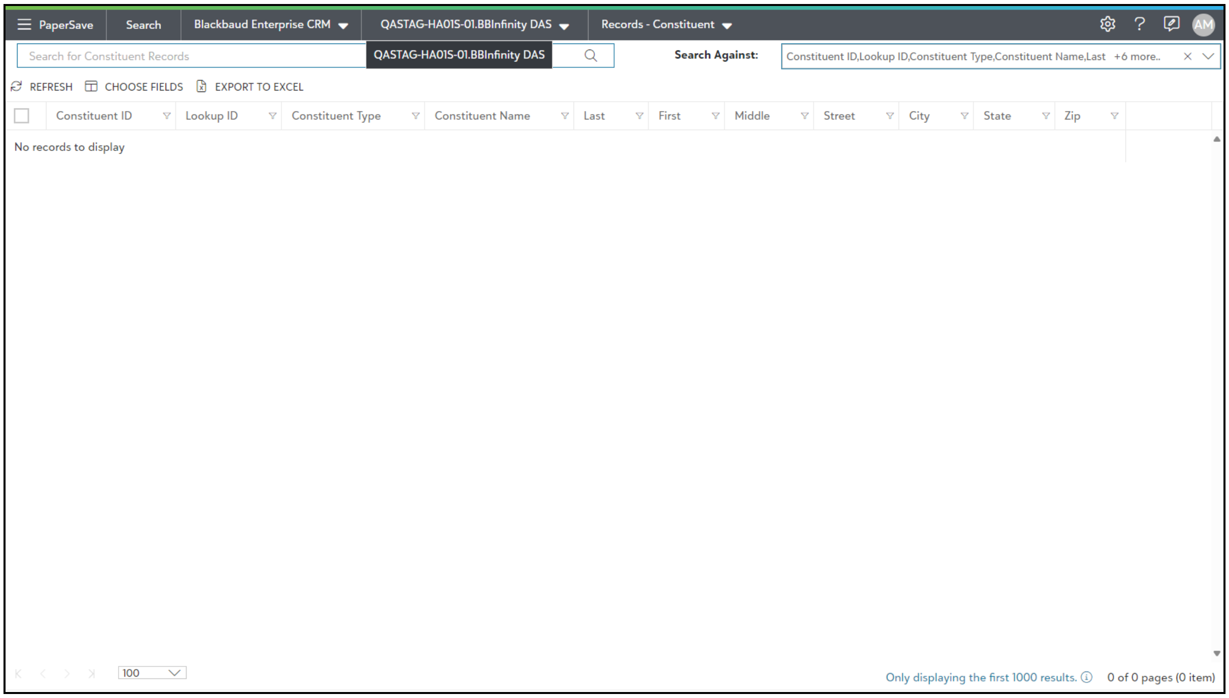
Choose Blackbaud Enterprise CRM from the Search drop-down to accomplish a search against the Integrated app record as shown in the below screen:



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.

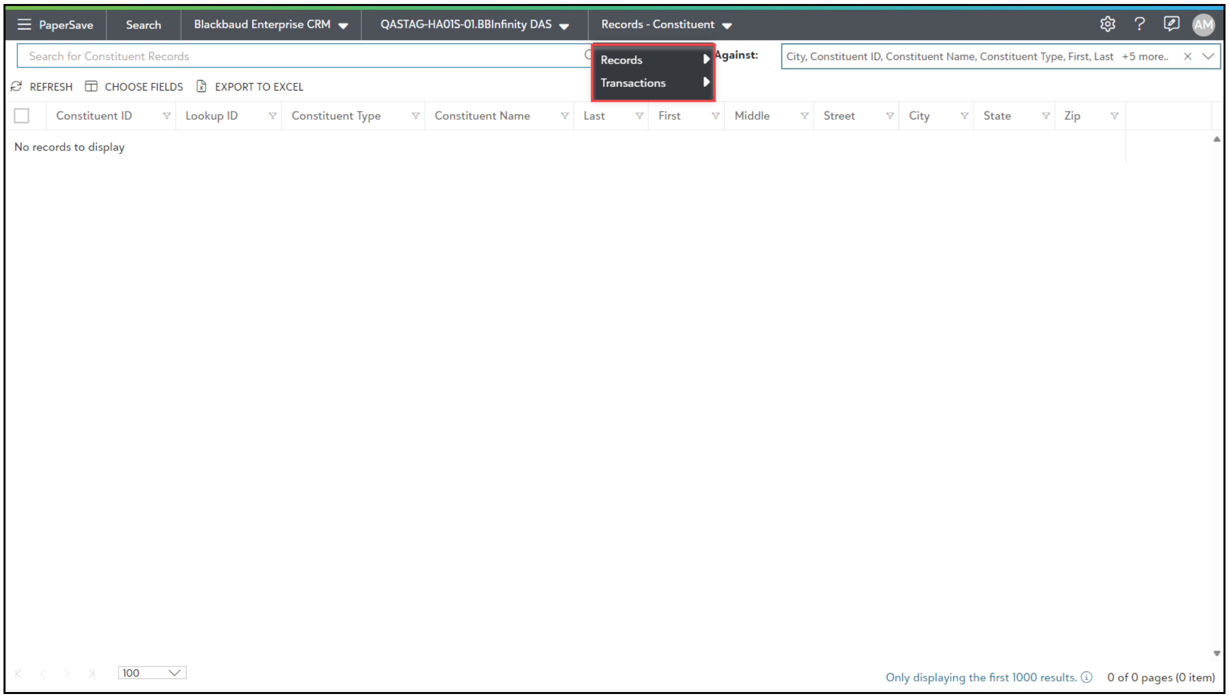


Note: Integrated App instance drop-down will be displayed in case of multiple instances. Once you switch to another Integrated application instance, then it will perform the search for the selected Integrated Application instance.

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

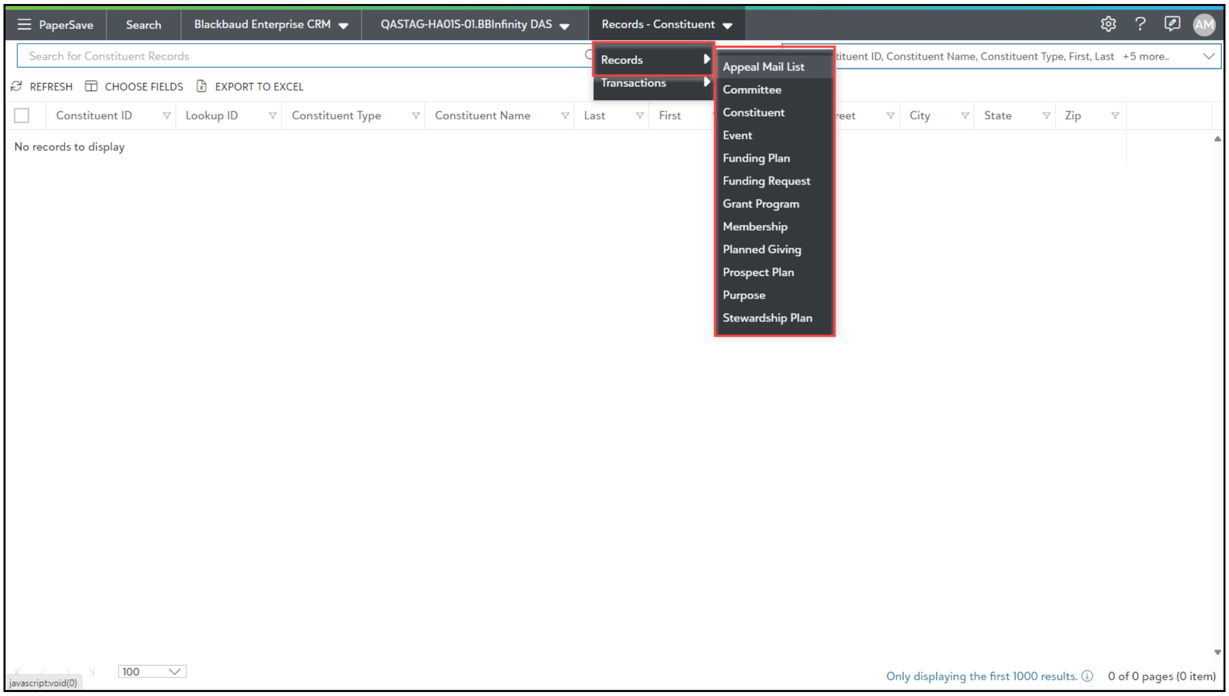
As you select the Blackbaud CRM, it will display the tiles for available record types. Select a desired record type from the given tiles:



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.

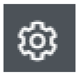


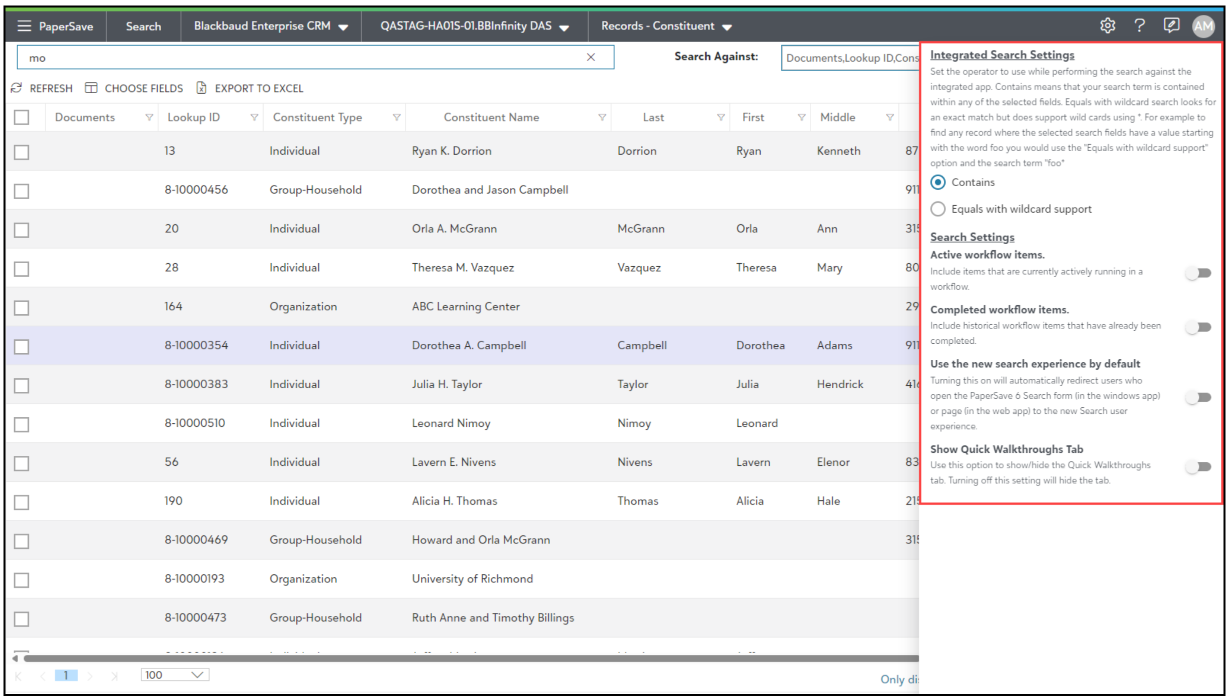
- Once you are done selecting the Integrated Application, Integrated Application Instance, and Record Type, then you are ready for searching the desired Integrated app records using search keywords.

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:



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.

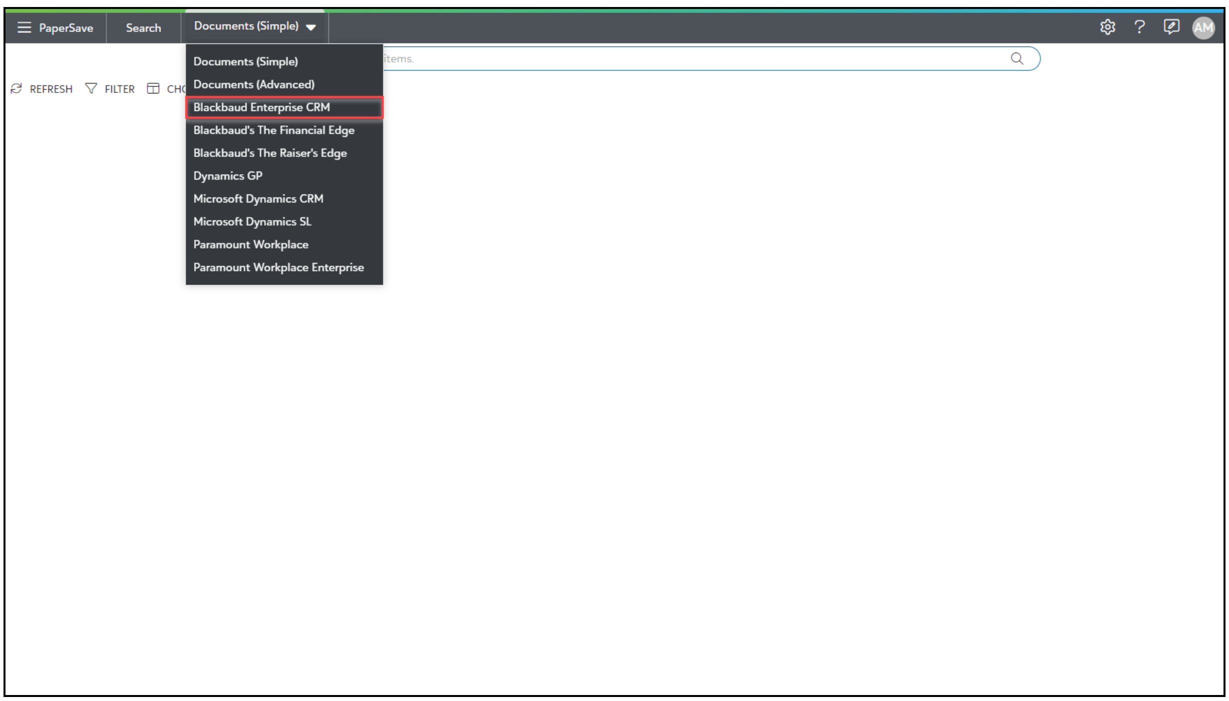
> **Note:** The options you select in the Settings Panel will be available for all search types. Hence, any changes made when in any search area will be reflected globally for the current user.

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.

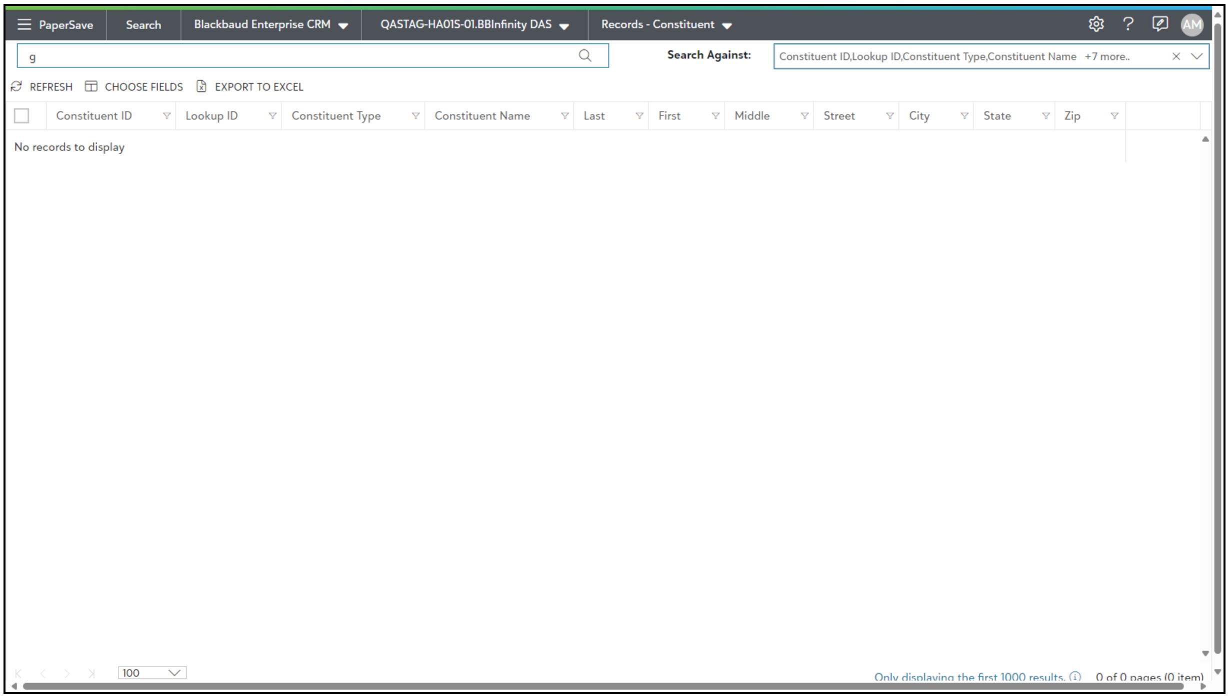
1) Click on the Search drop-down. You will see a list of Integrated Applications (defined in the Configuration Area). Select the desired Blackbaud CRM from the Search drop-down.



2) Select the desired Integrated Application Instance if there are multiple instances.

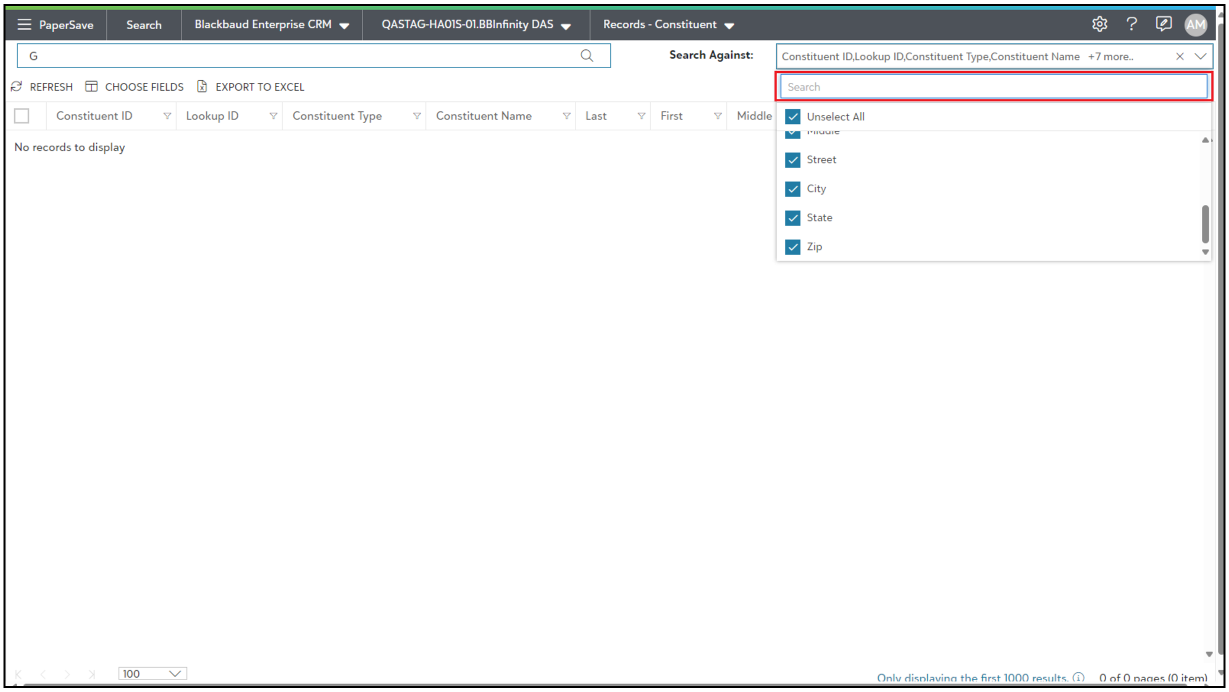
3) You will see a list of supported Record types for the selected Integrated Application in the Application bar drop-down (tile view if you are accessing for the first time). Select the desired Record Type.

4) **Enter** the desired keyword to narrow down the search in the left search box (titled "search for <Record Type> records").

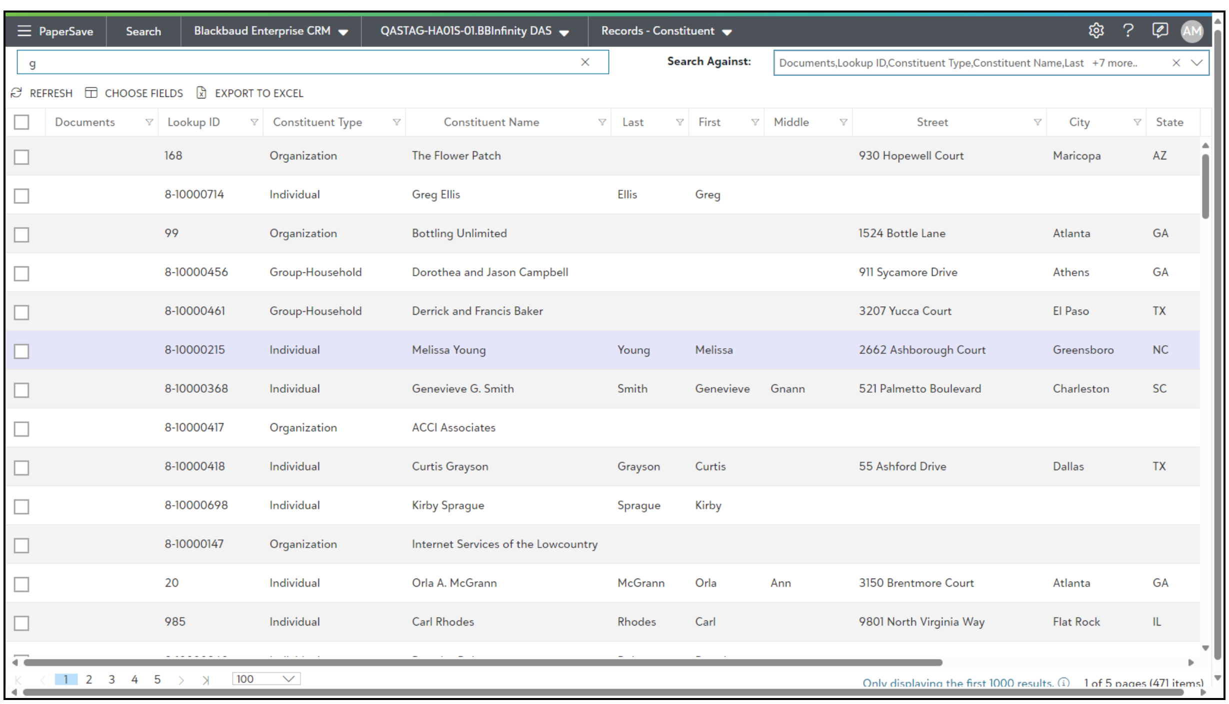


5) **Select** the fields from the "Search Against" drop-down on the right corner of the screen to further narrow down your Search. Also, you can perform the search against all the fields for the selected record type.

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.

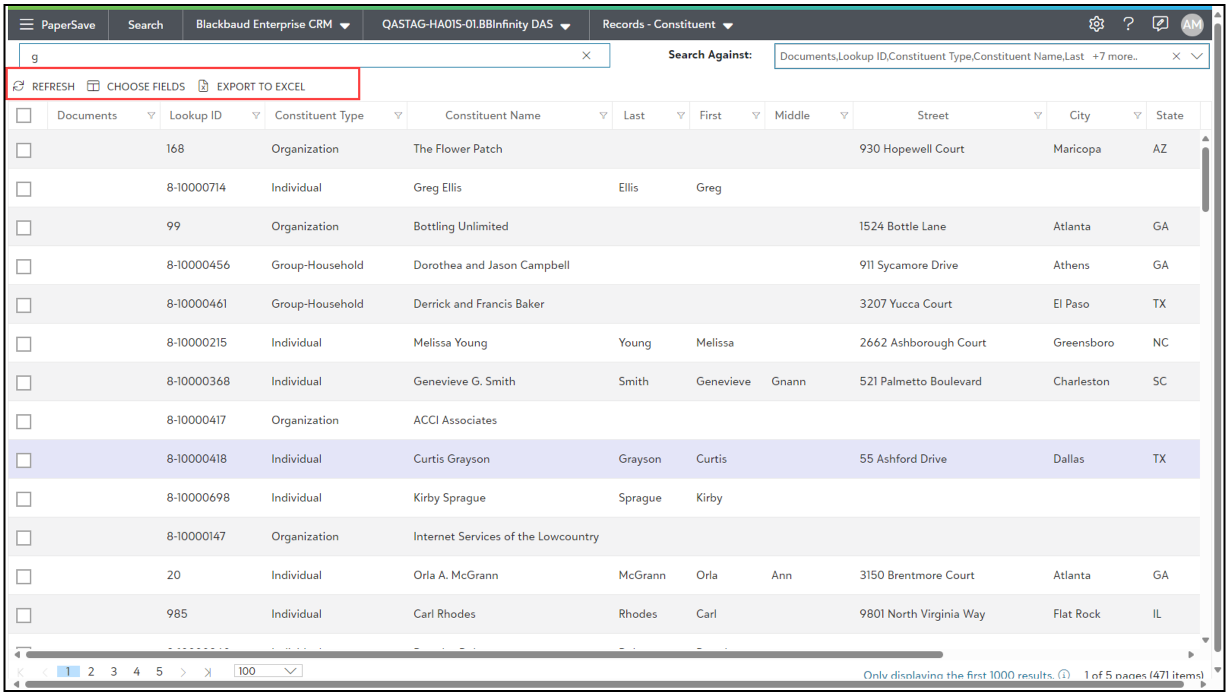


- The search result will display a list of matching Integrated App records as shown in the below screen:



Integrated App Search List toolbar

The Integrated App Search offers a list toolbar as shown below:



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**

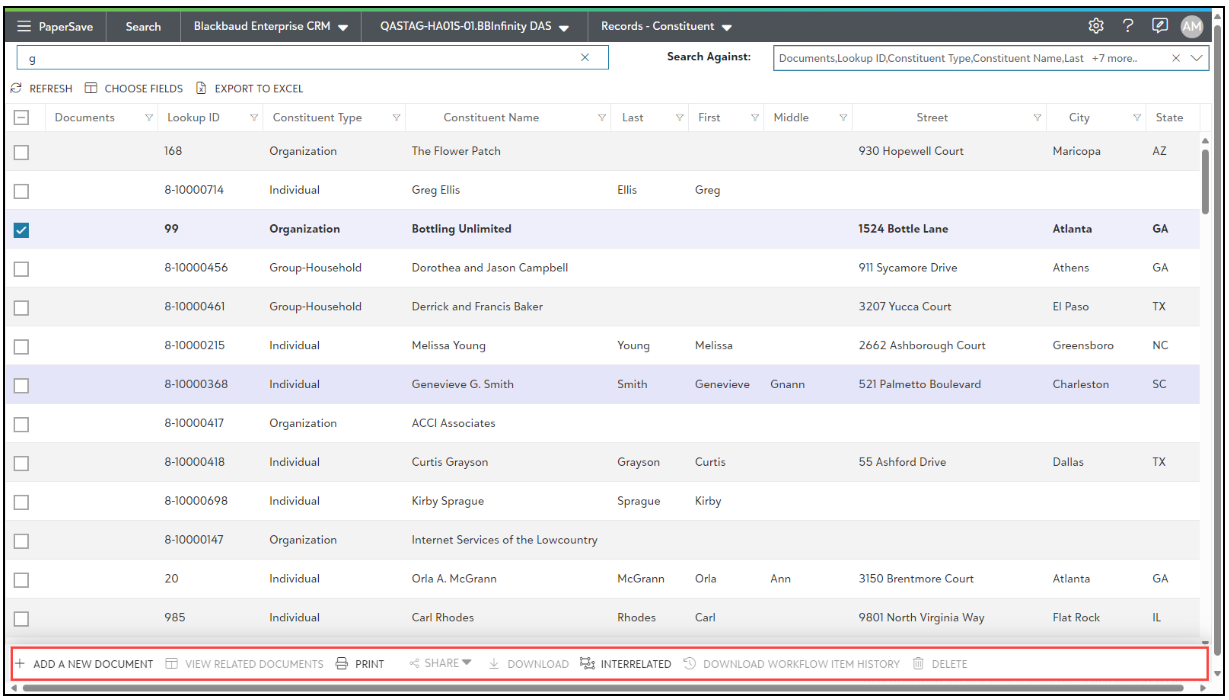
You can set desired preferences for the fields to be displayed in the current list using Choose Fields. Learn more about Choose Fields.

- **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**

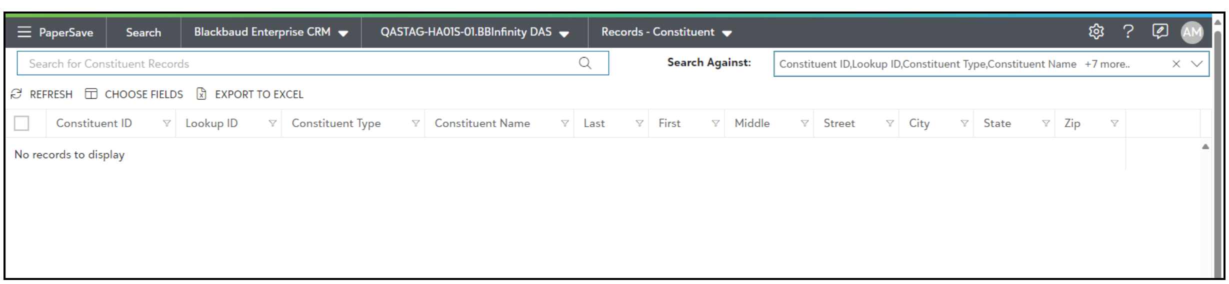
Currently, this option is not available for the users.

Adding a new document to Blackbaud CRM record

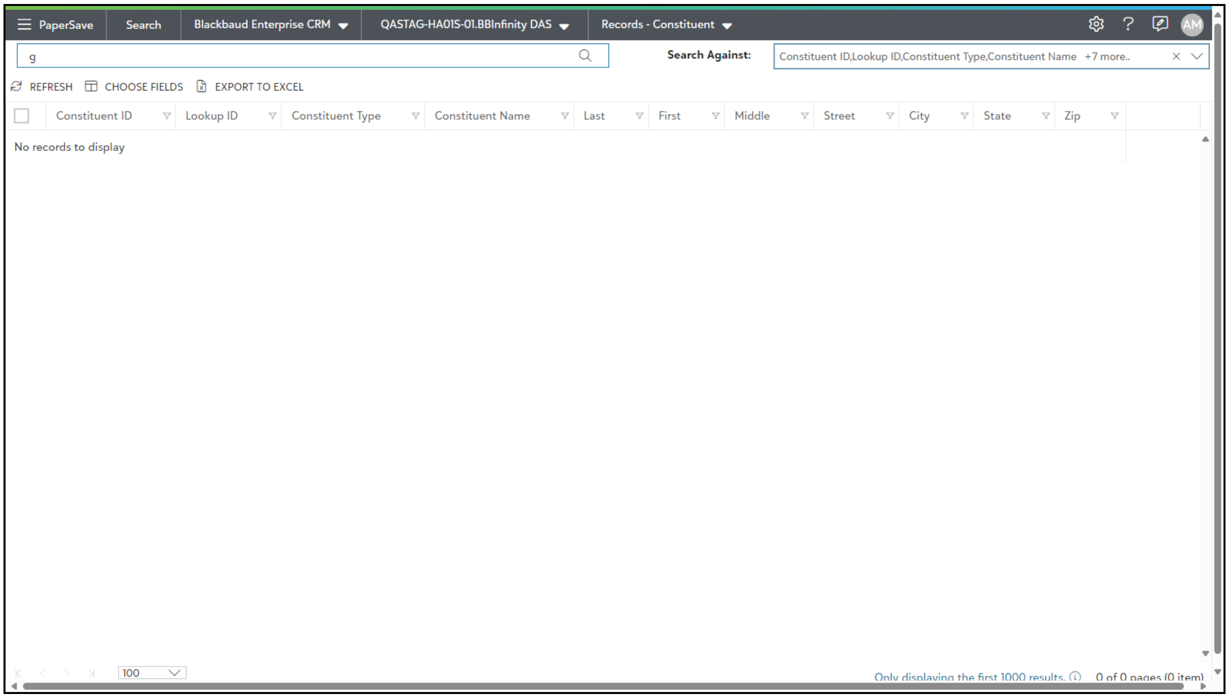
Search Area enables you to add new documents to an Blackbaud CRM record using various file capture options such as Scan using TWAIN compliant scanner or Fujitsu fi-NX series scanner, Drag files or select files from your file explorer, and click to generate a barcode to scan the documents in a batch at a later time.

Follow the below steps to add a new document in an Integrated App record from the Search Area:

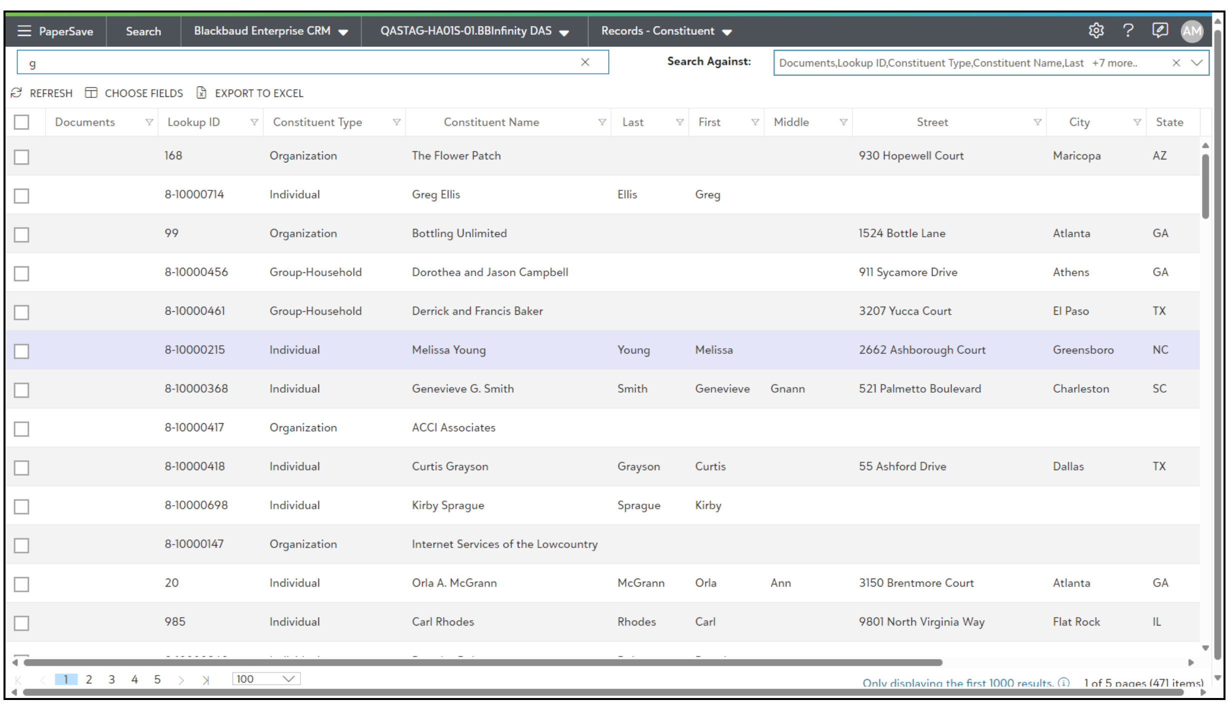
1) Select the Blackbaud CRM from the Search drop-down. Also, you can Select your desired Integrated application instance (in case of multiple instances only). Now, select the desired Record type from the drop down as shown in the below screen.



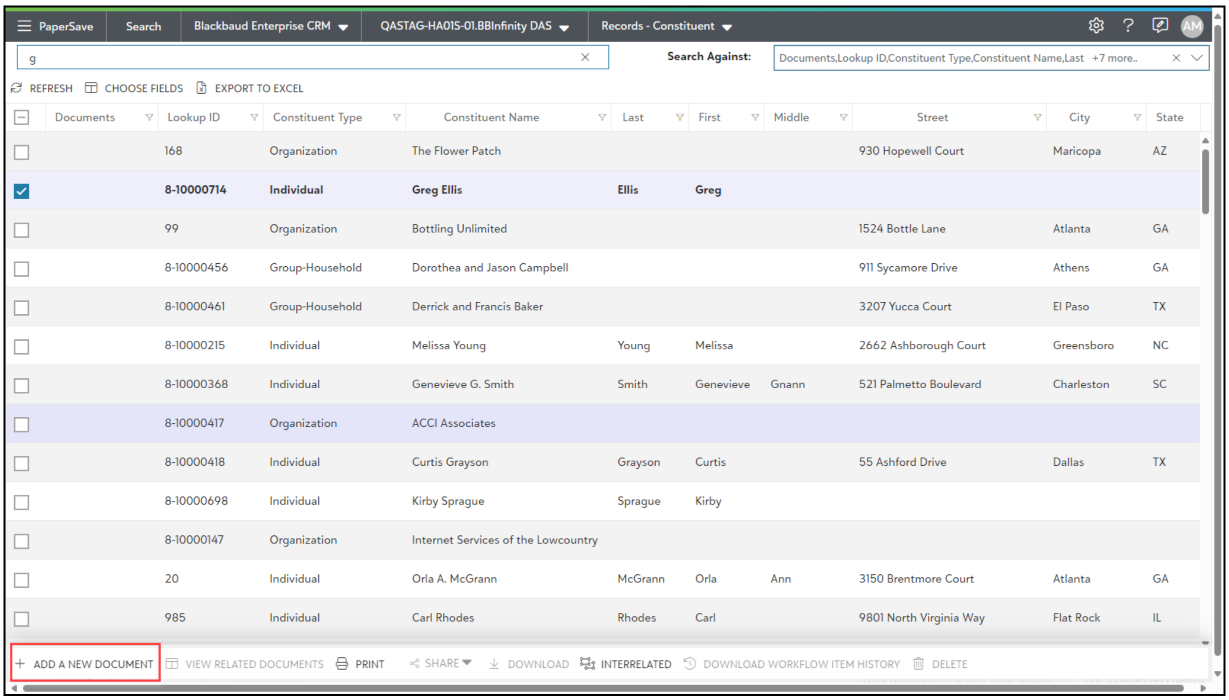
2) **Enter** the keywords to **search** documents for the desired record type in an integrated application. Then, press Enter or click on the search icon to load all the matching records for the selected record type.



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:

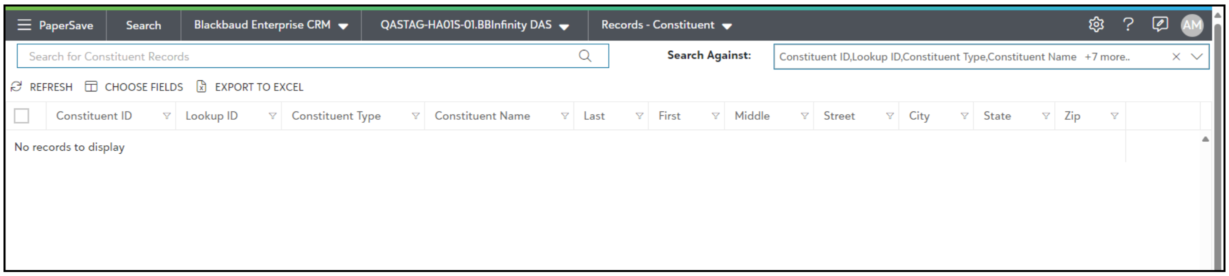
File Capture options Settings

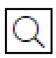
The following video explains the File Capture Settings panel in the Search Area:

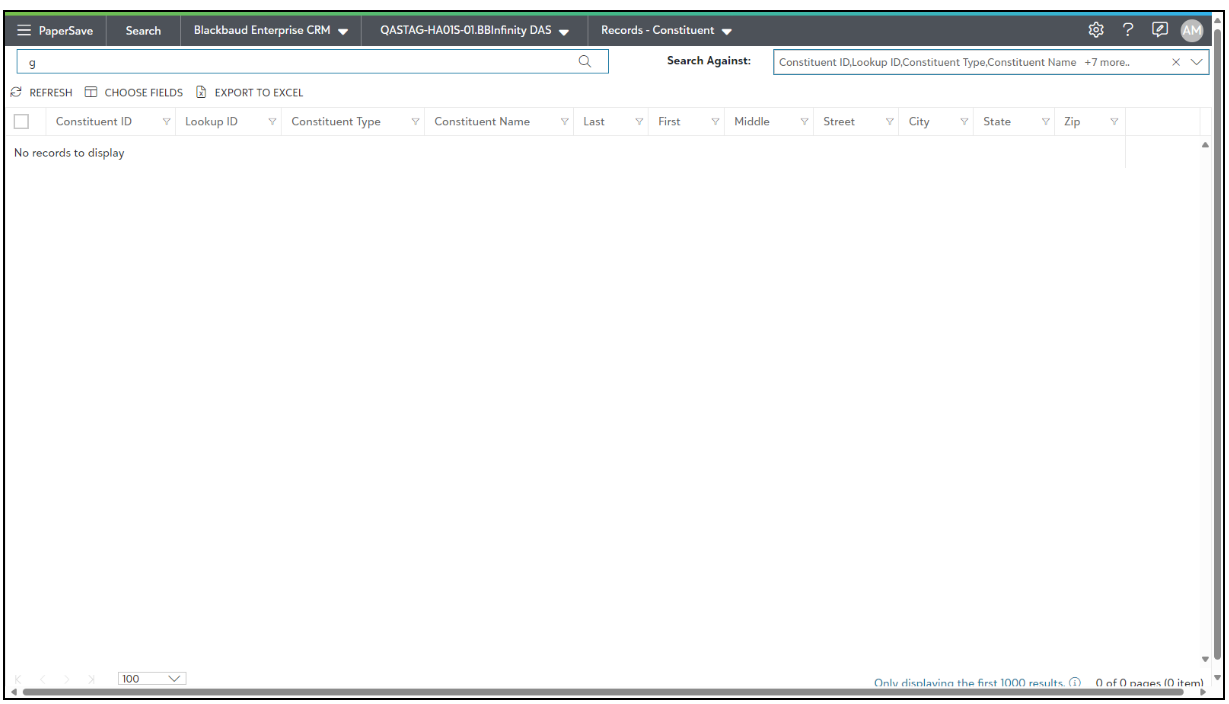
View Related documents of Blackbaud CRM record

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 CRMrecord:

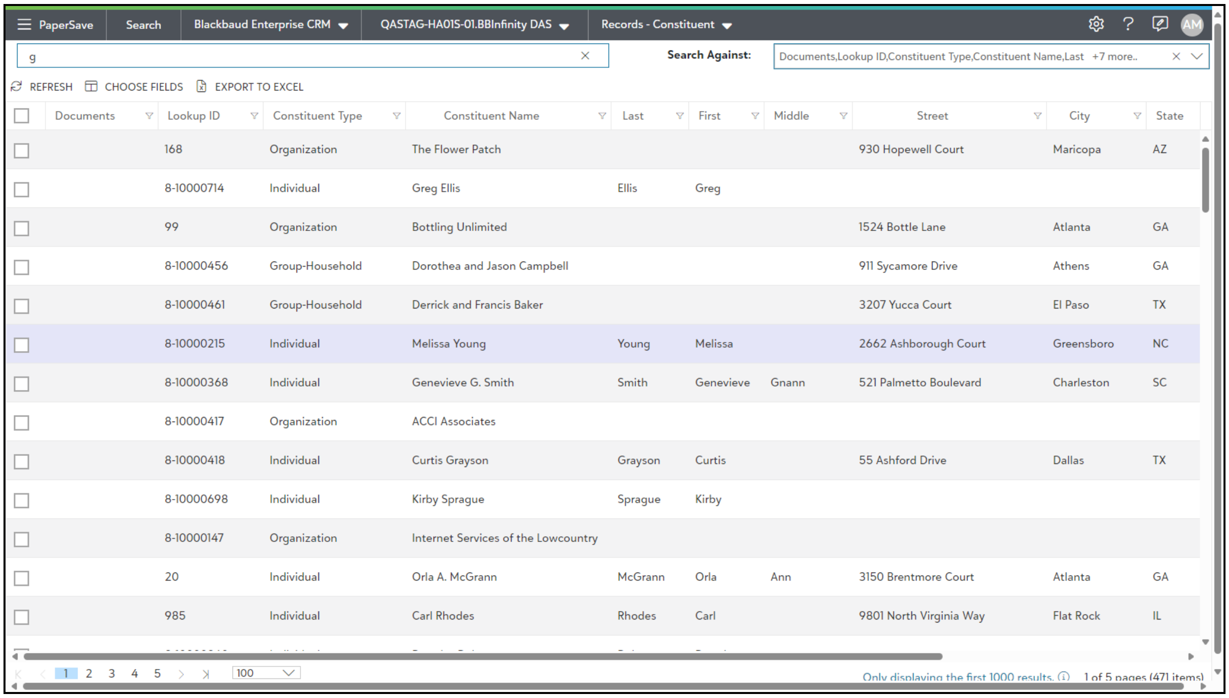
1) Select Blackbaud CRMfrom the Search drop-down. Also, you can Select your desired integrated application instance (in case of multiple instances only). Now, select the desired Record type from the drop down as shown in the below screen.



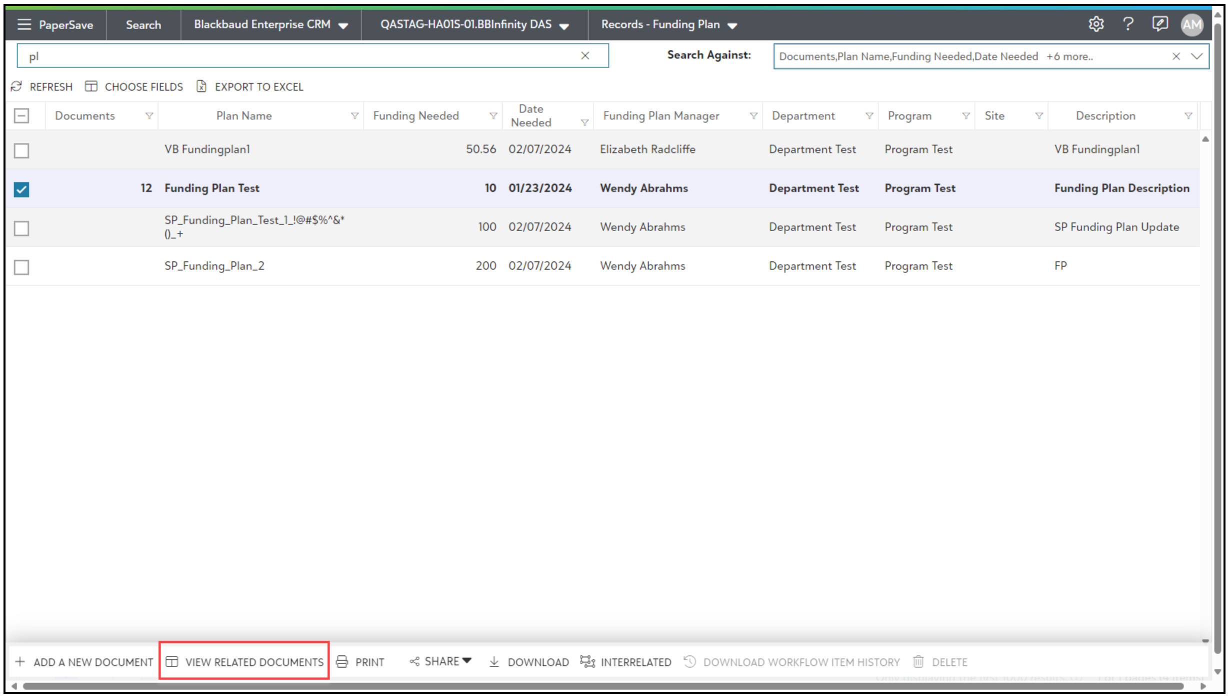
2) **Enter** the keywords to **search** documents for the desired record type in an integrated application. Then, press Enter or click on the search icon  to view all the matching records for the selected record type.



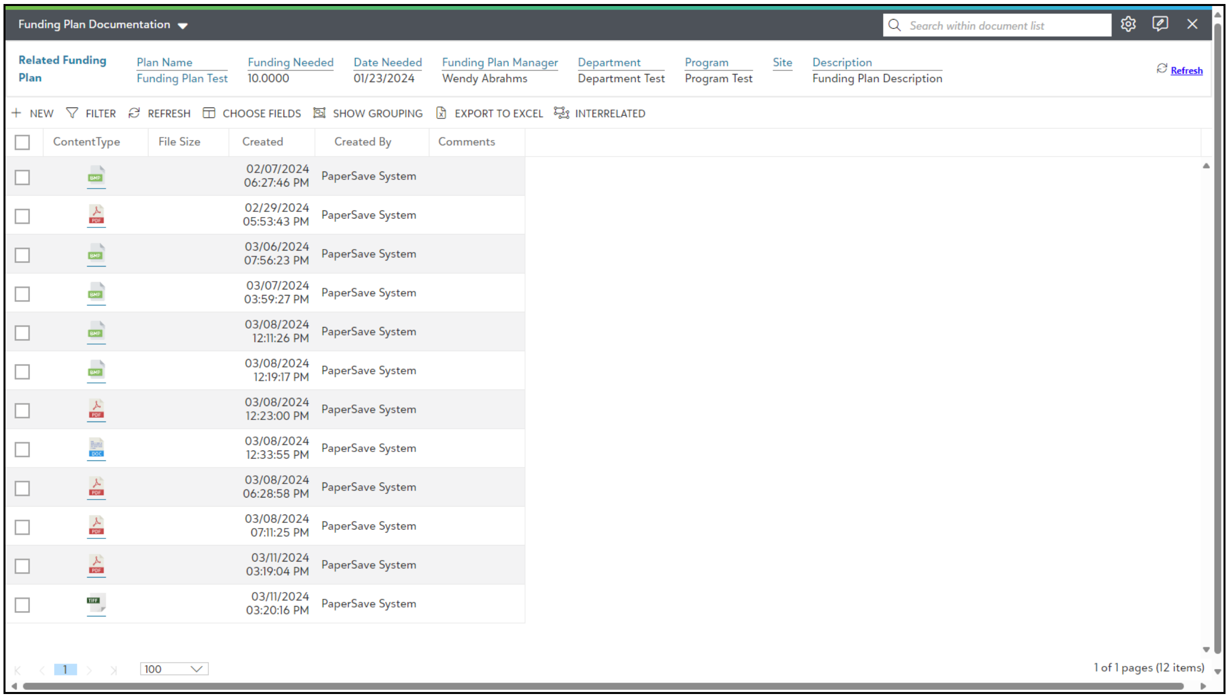
3) You will see a list of matching records based on the entered search keyword.



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.



- 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.

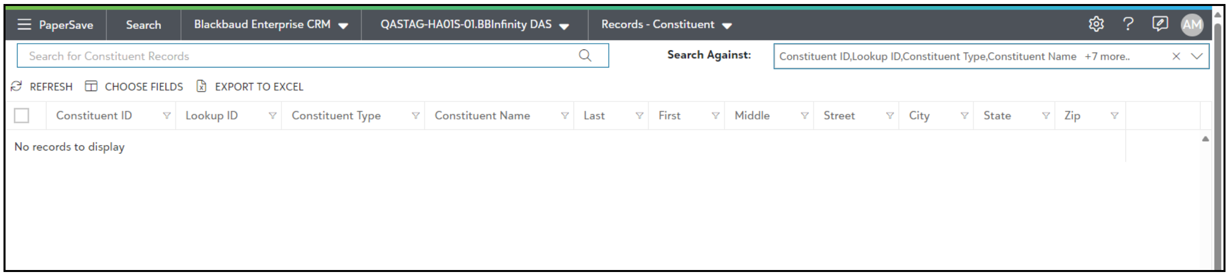


Tip: You can view the related documents for a **record** in the chosen integrated application context by double clicking on that particular record. The Record must have documents attached to it.

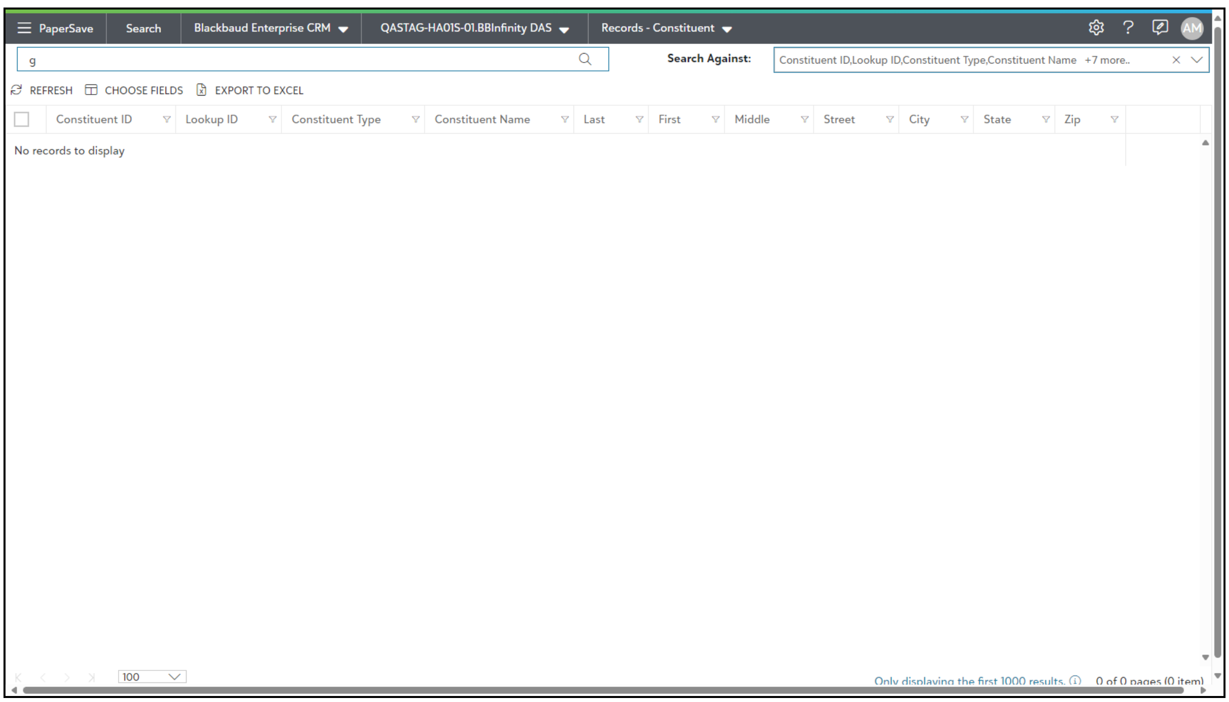
View Interrelated documents for Blackbaud CRM record

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:

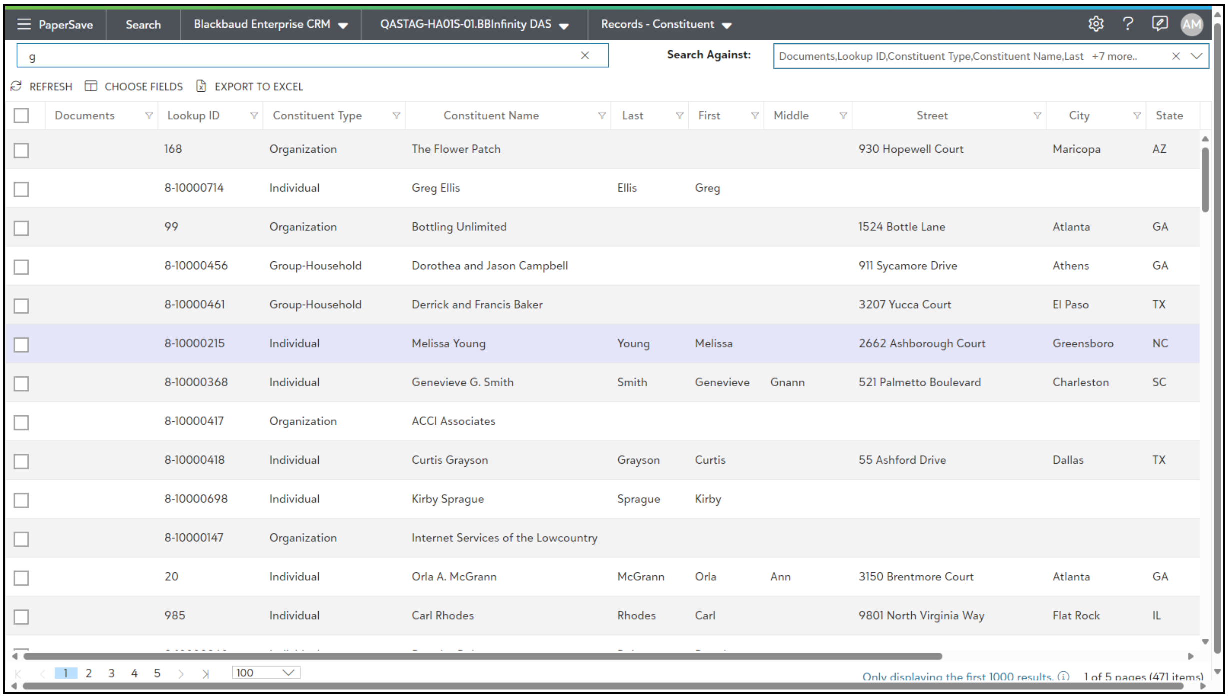
1) Select the Blackbaud CRM from the Search drop-down. Also, you can Select your desired Integrated application instance (in case of multiple instances only). Now, select the desired Record type from the drop down as shown in the below screen.



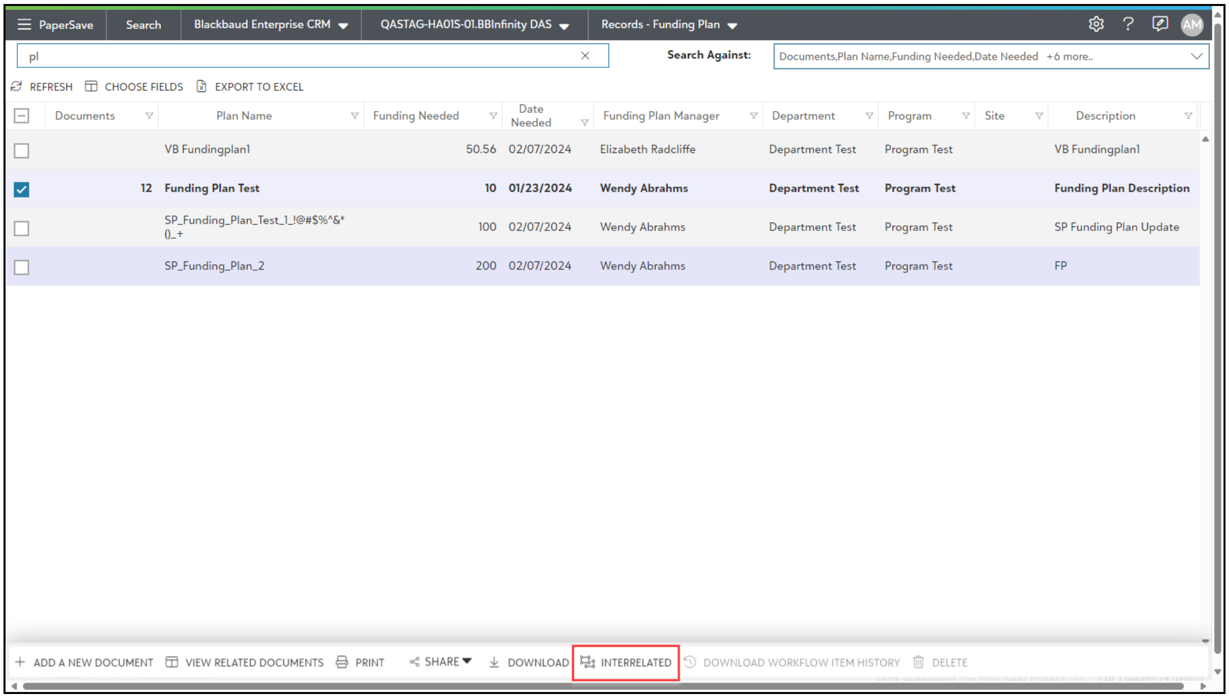
2) **Enter** the keywords to **search** documents for the desired record type in an Blackbaud CRM. Then, press Enter or click on the search icon to load all the matching records for the selected record type.



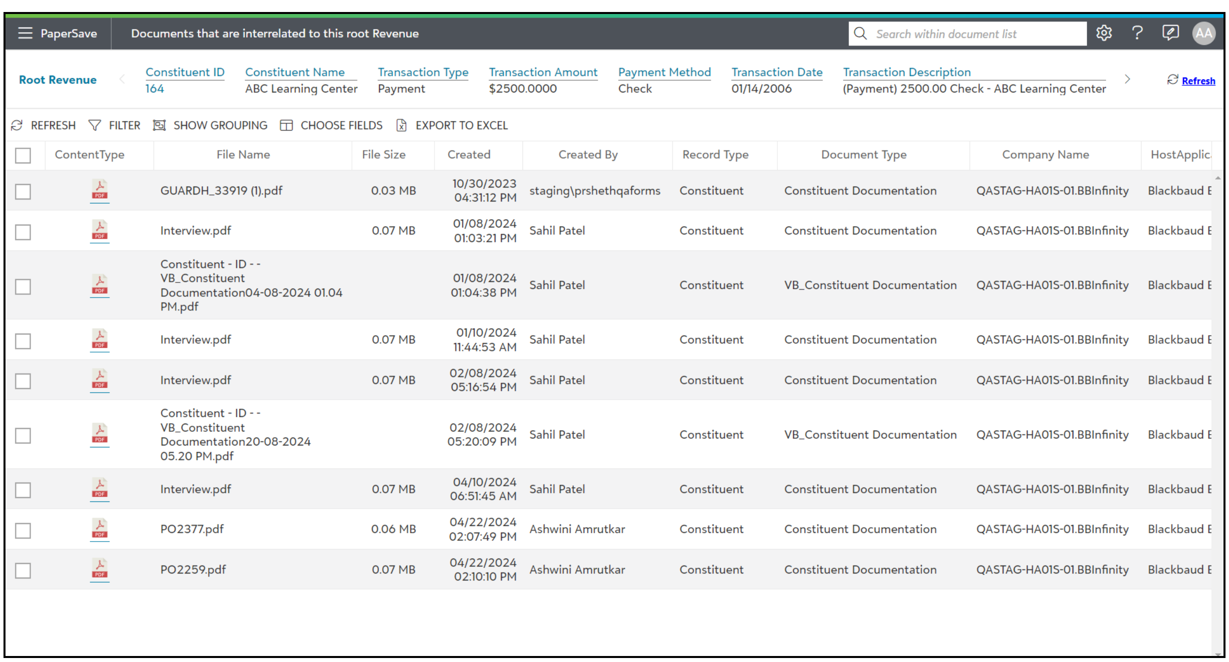
3) You will see a list of matching records based on the entered search keyword.



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.



- 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.



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.

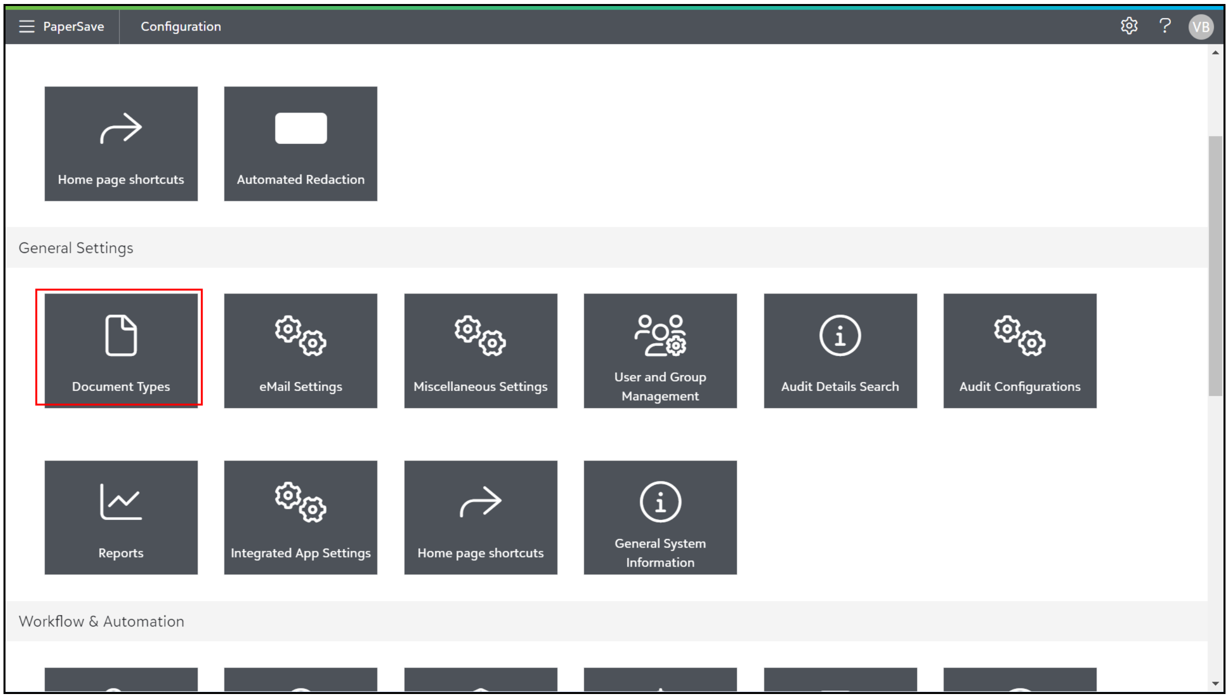
General Settings

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**.

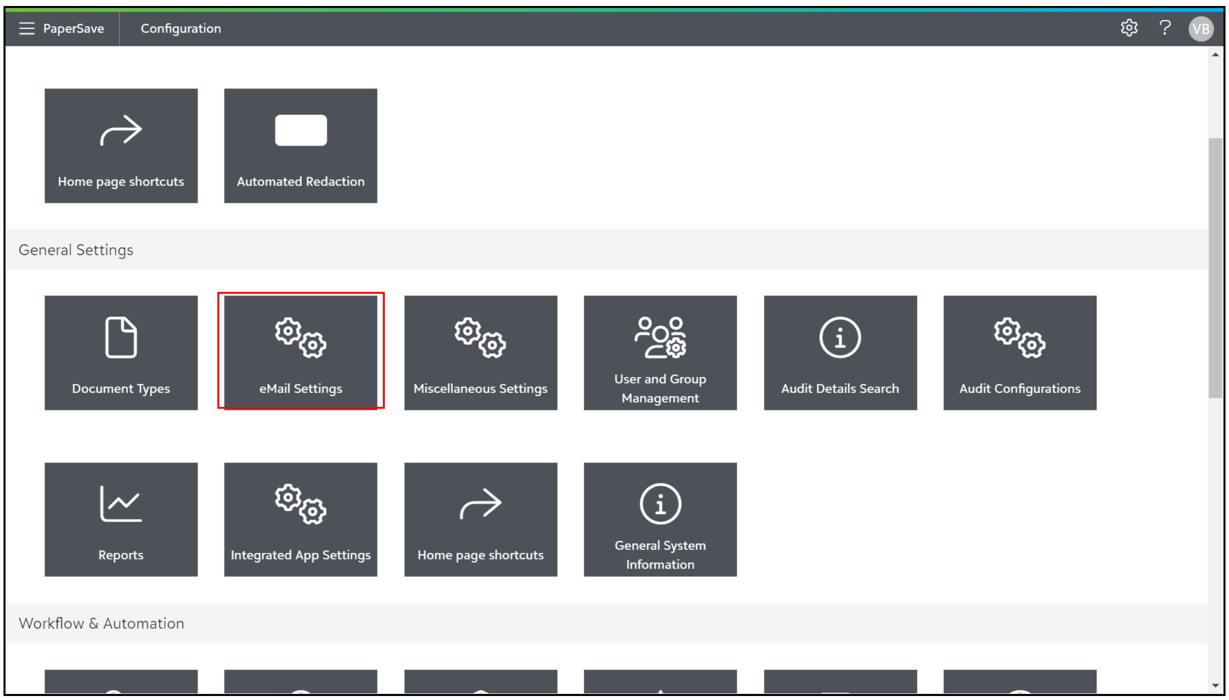
eMail Settings option enables you to perform the following operations:

- Enable/Disable Diagnostic email alerts.
- Define email addresses to receive diagnostic email alerts.

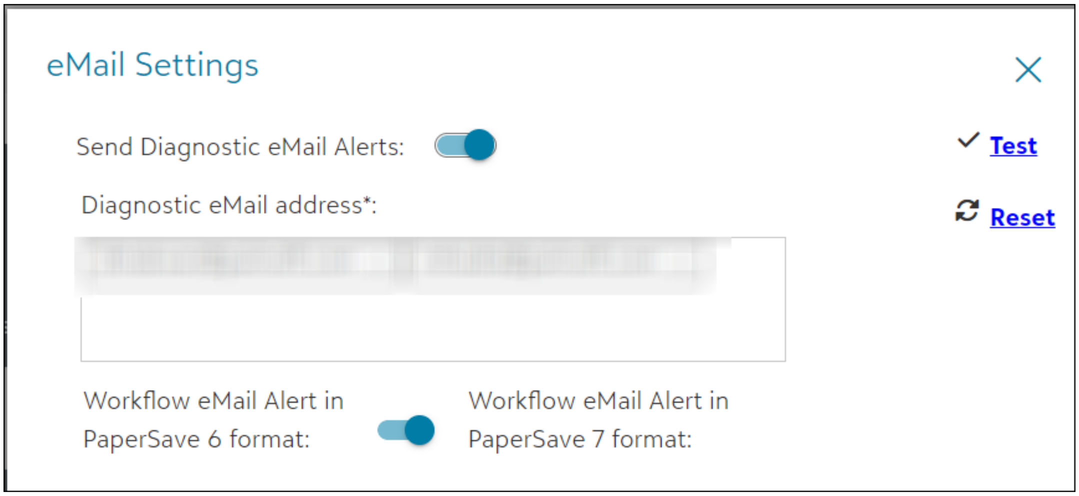
- Send an email alert to the specified email addresses (using the Test option).
- Choose the Notification style for email alerts (that is PaperSave 6x or 7x format).

Follow the below steps to configure PaperSave eMail Settings:

1) Click on **eMail Settings** in General Settings section of the Configuration Area.

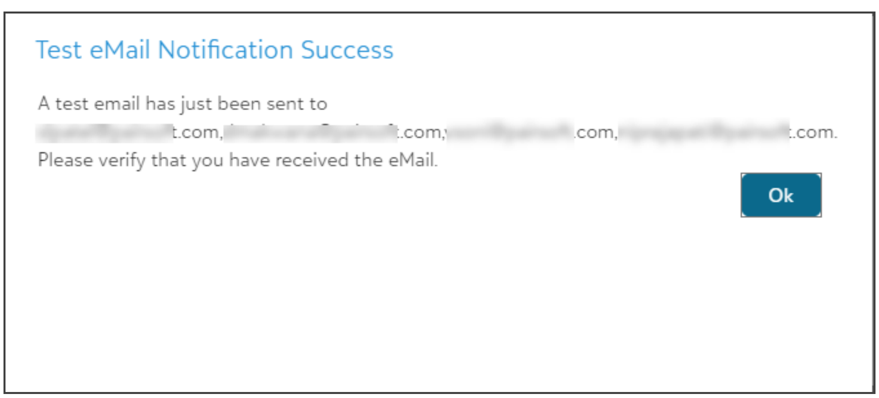


2) Now, eMail Settings dialog box pops up as shown in the below screen.



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.

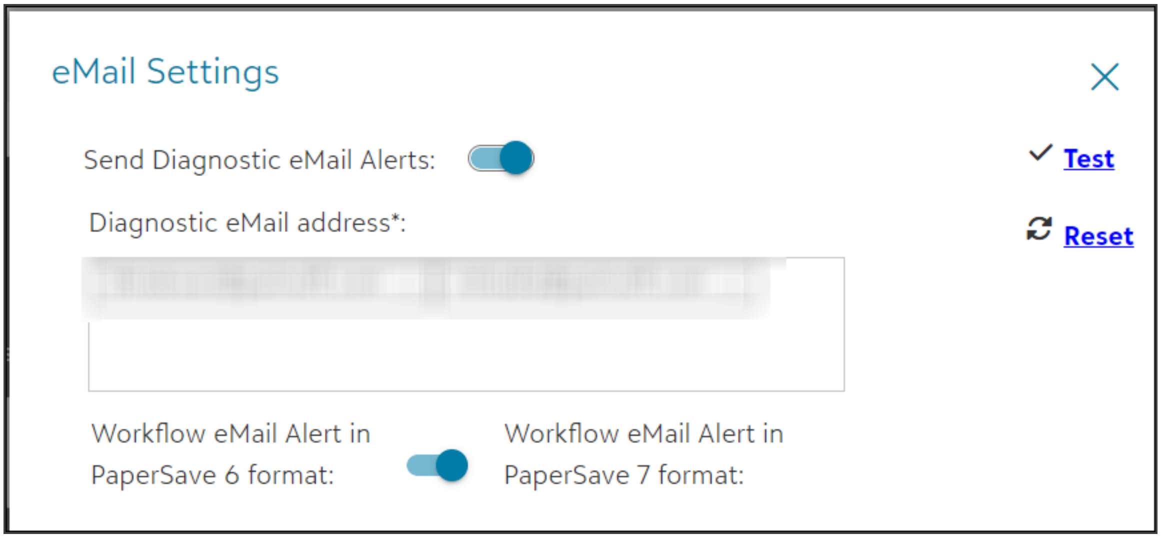
> **Note:** Click here to learn more about PaperSave email notifications style.

PaperSave eMail notification style

The following are various eMail notifications style in PaperSave 6x format and PaperSave 7x format.

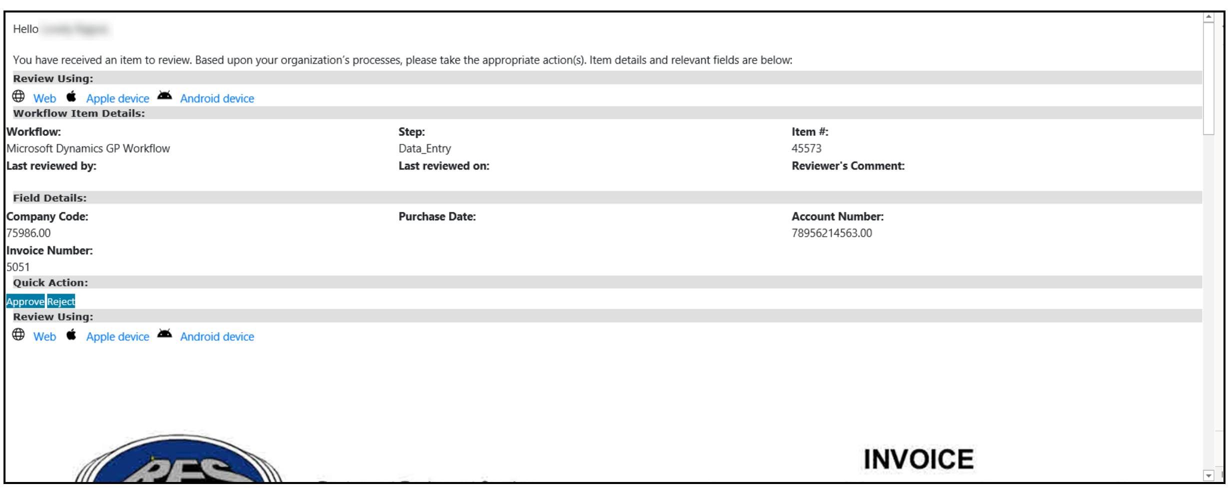
- PaperSave 7 style eMail notification - Per Item
- PaperSave 7 style email notification - In Group
- PaperSave 6 style email notifications - Per Item
- PaperSave 6 style email notifications - In Group

> **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.



PaperSave 7 style eMail notification - Per Item

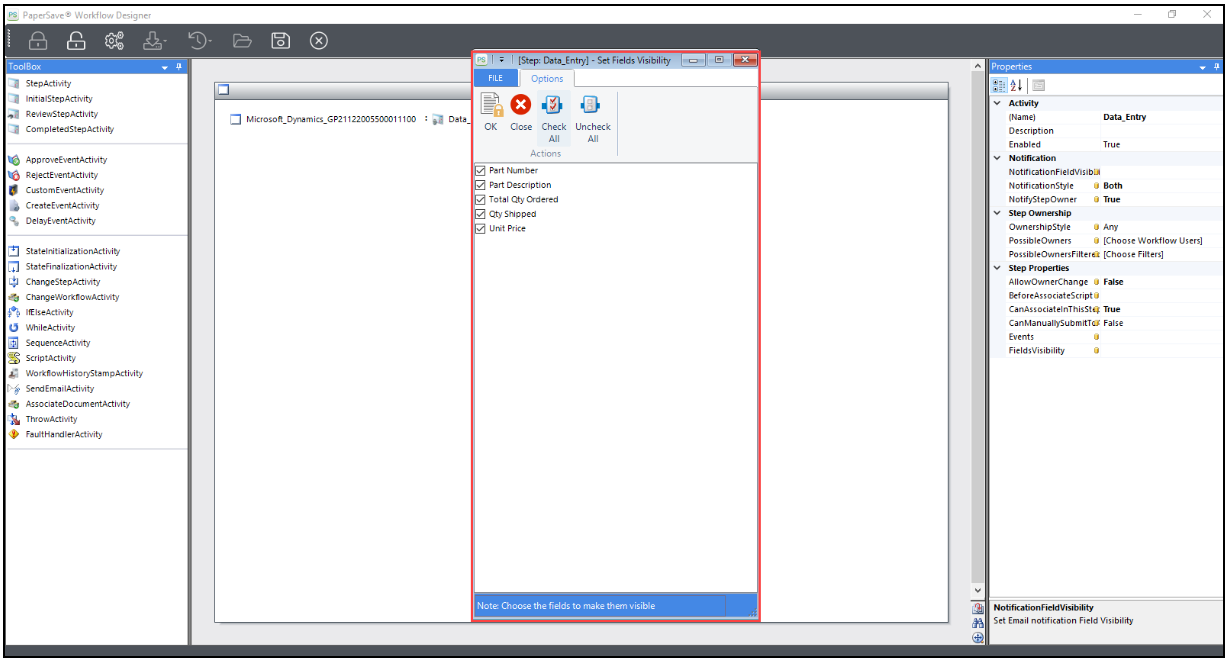
For notification style defined as "**Per Item**", you will receive the email notification in the following format. The email notification subject includes the Workflow name and Workflow ID.



The email for **Per Item** notification style is divided into the following sections:

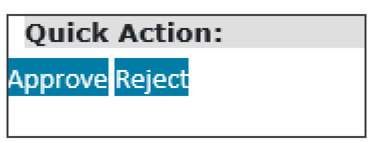
1) **Workflow Item Details**: This section displays details such as Workflow name, current step of Workflow item, Workflow ID, last reviewer's name last review date and Reviewer's comments.

2) **Field Details**: This section includes the Workflow fields selected from the **NotificationFieldVisibility** field in the Notification section from the properties of Workflow designer as shown in the below screen:



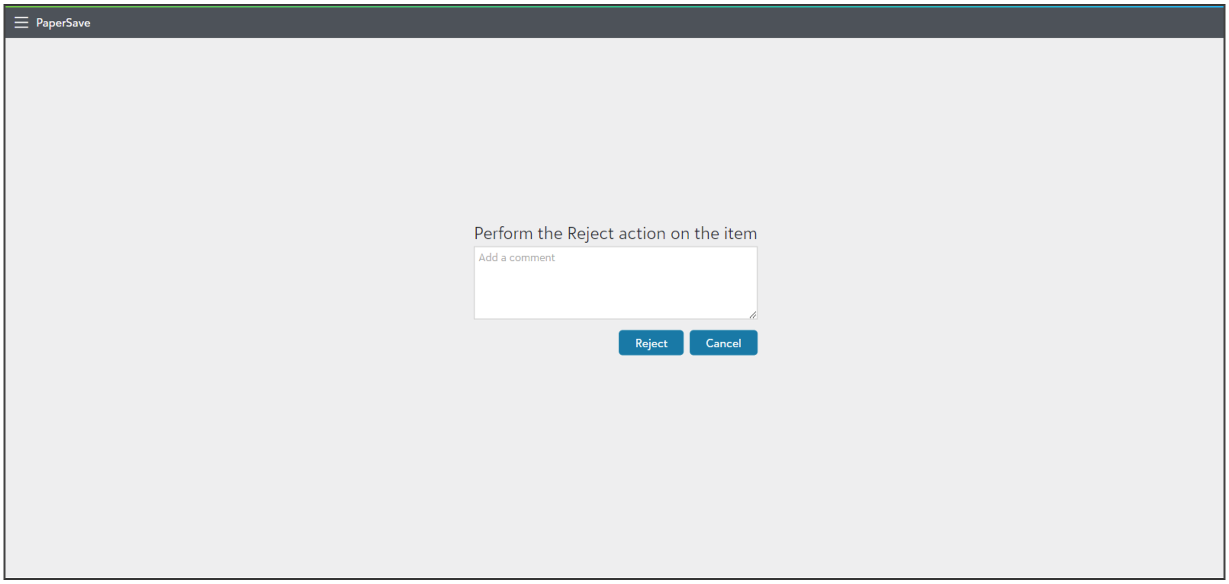
3) **Quick Action**: This section allows you to directly raise the Workflow event from the email. On clicking the event, it will navigate you to a web browser where you can enter the comment for the Workflow item. The events displayed in this section are configured in the Fields Details.

> **Note:** You can perform any one action through Quick Action.

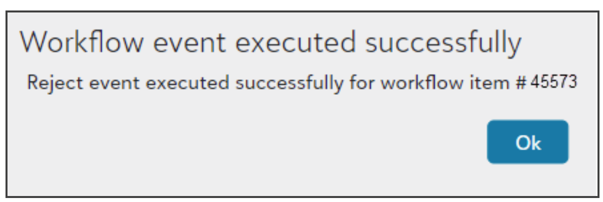


- When you raise any event for an item, then it will redirect you to PaperSave screen as shown below. Here, you can enter the comment and click on **Approve** to approve the item or on **Cancel** to exit the

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.

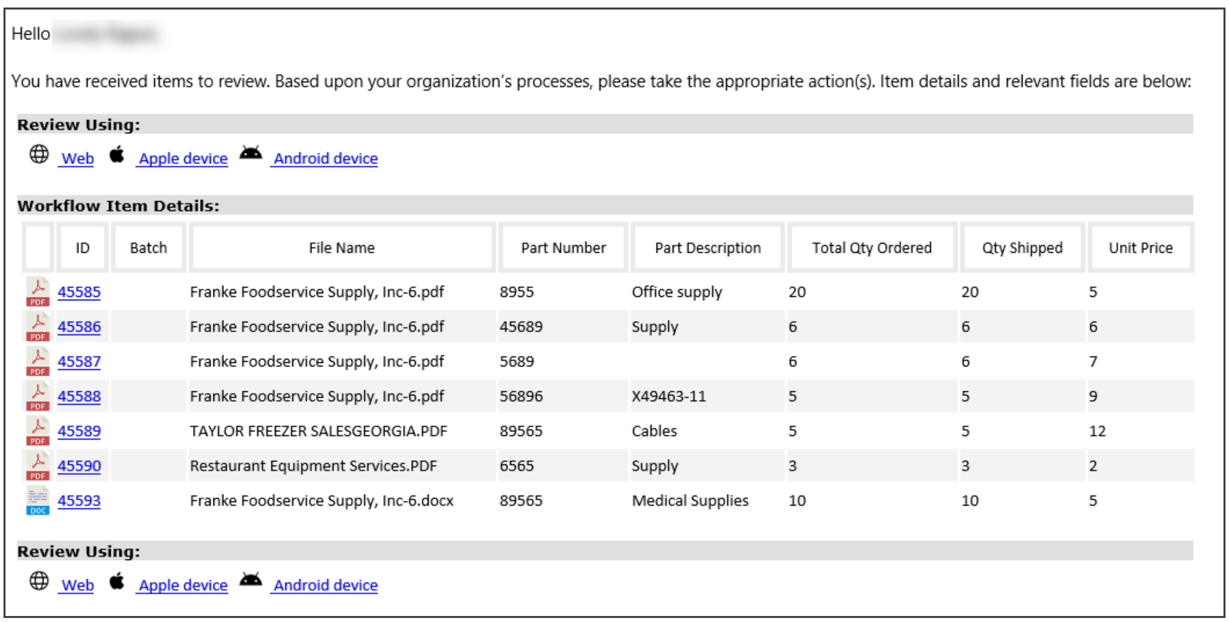


4) **Review Using**: This section provides you the following three ways to review the Workflow item received in the email. You can click on the review hyperlink to view the Workflow item in respective PaperSave application variant.

- 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

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:

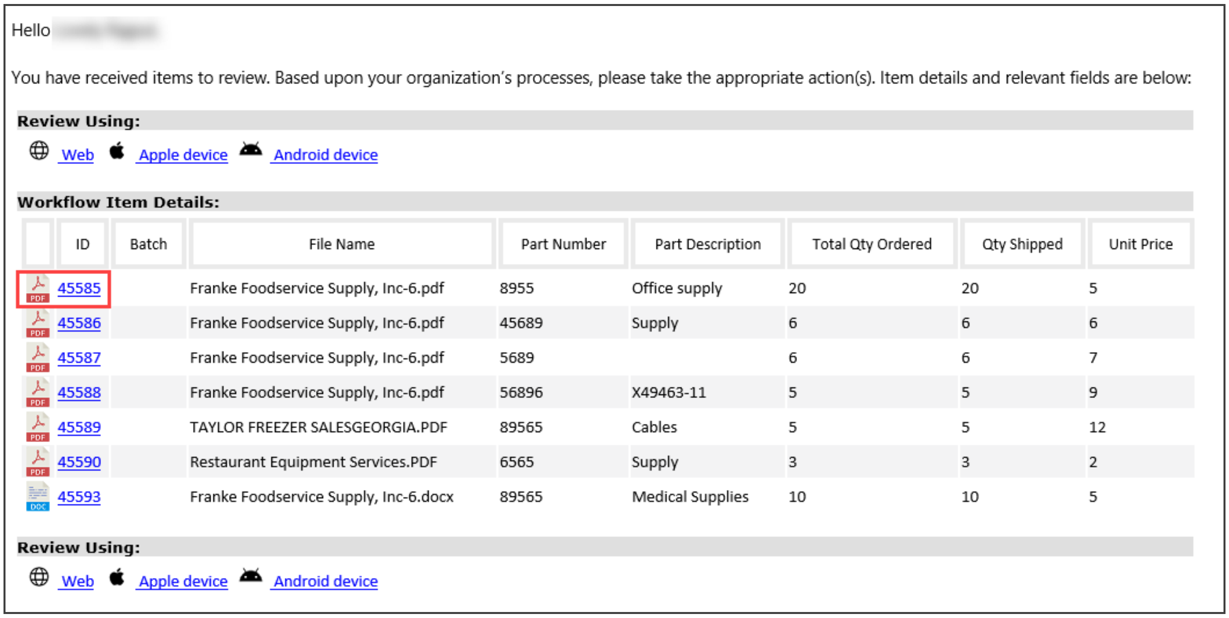
	ID	Batch	File Name	Part Number	Part Description	Total Qty Ordered	Qty Shipped	Unit Price
	45585		Franke Foodservice Supply, Inc-6.pdf	8955	Office supply	20	20	5
	45586		Franke Foodservice Supply, Inc-6.pdf	45689	Supply	6	6	6
	45587		Franke Foodservice Supply, Inc-6.pdf	5689		6	6	7
	45588		Franke Foodservice Supply, Inc-6.pdf	56896	X49463-11	5	5	9
	45589		TAYLOR FREEZER SALESGEORGIA.PDF	89565	Cables	5	5	12
	45590		Restaurant Equipment Services.PDF	6565	Supply	3	3	2
	45593		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

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
	45585		Franke Foodservice Supply, Inc-6.pdf	8955	Office supply	20	20	5
	45586		Franke Foodservice Supply, Inc-6.pdf	45689	Supply	6	6	6
	45587		Franke Foodservice Supply, Inc-6.pdf	5689		6	6	7
	45588		Franke Foodservice Supply, Inc-6.pdf	56896	X49463-11	5	5	9
	45589		TAYLOR FREEZER SALESGEORGIA.PDF	89565	Cables	5	5	12
	45590		Restaurant Equipment Services.PDF	6565	Supply	3	3	2
	45593		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.

- 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.

Web Review | iOS Review | Android Review | Windows Review

Review or Work the following item in your Workflow:

Workflow Step	Data_Entry
Workflow	Microsoft Dynamics GP
Workflow Item ID	45584
File Name	Franke Foodservice Supply, Inc-6.pdf
Current Owner	[illegible]
Approval	[illegible]
Document Type	Requisition Documentation
Part Number	59865
Part Description	Cables
Total Qty Ordered	5
Qty Shipped	5
Unit Price	10

For more information please review the PaperSave User Guide or go to www.papersave.com

Web Review | iOS Review | Android Review | Windows Review

The PaperSave System

PAPERSAVE®
Efficiency. Simplified.

PaperSave is a product of WhiteOwl

The email for **Per Item** notification style is divided into the following sections:

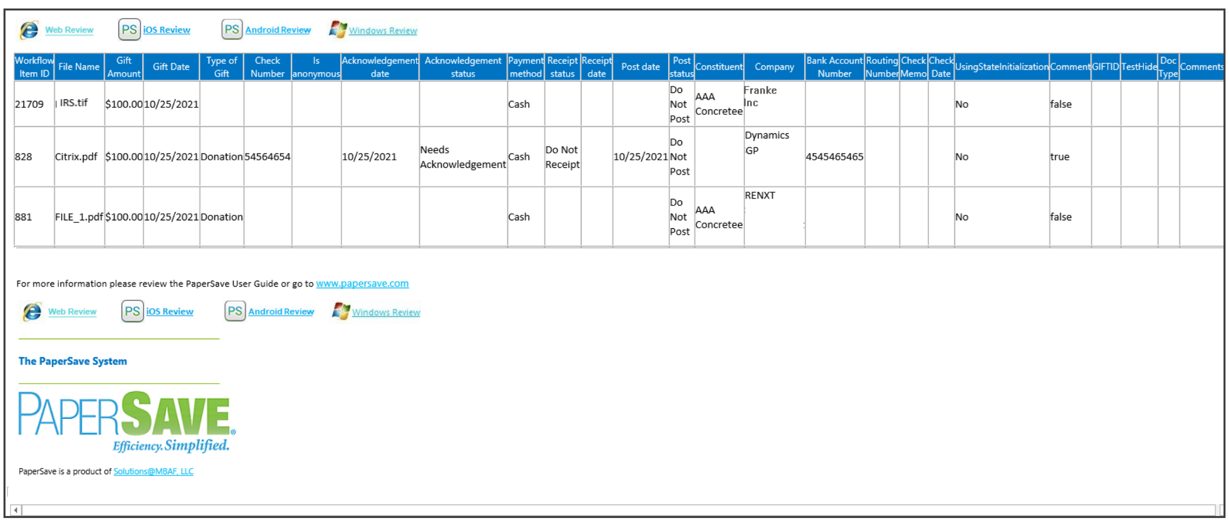
1) **Workflow Item Details**: This section displays Workflow Fields/Document Type fields by default, which includes Workflow Step, Workflow name, Workflow Item ID, File Name, Current Owner, Approval and Document Type and all fields as configured in Workflow.

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.



Web Review iOS Review Android Review Windows 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	UsingStateInitialization	Comment	GIFTID	TestHide	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

Web Review iOS Review Android Review Windows Review

The PaperSave System

PAPERSAVE Efficiency. Simplified.

PaperSave is a product of 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.

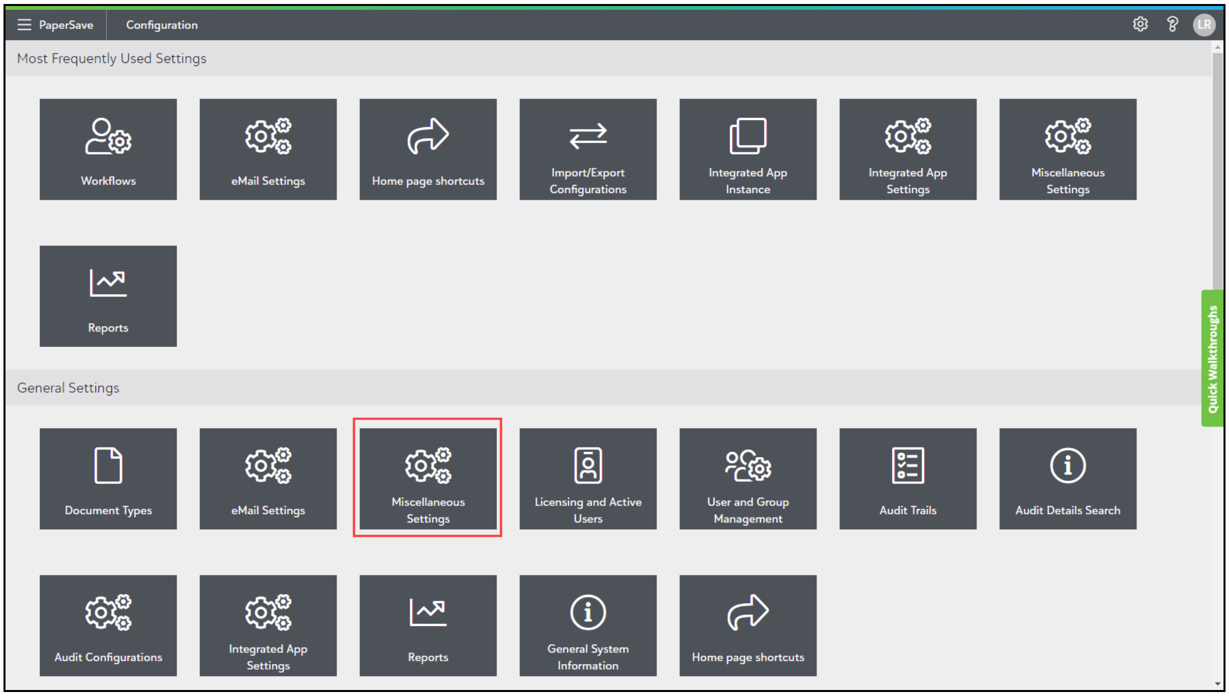
2) **Review Using**: This section provides you the following ways to review the Workflow items. You can click on the review hyperlink to view the list of all the Workflow items in respective PaperSave application variant.

- 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.

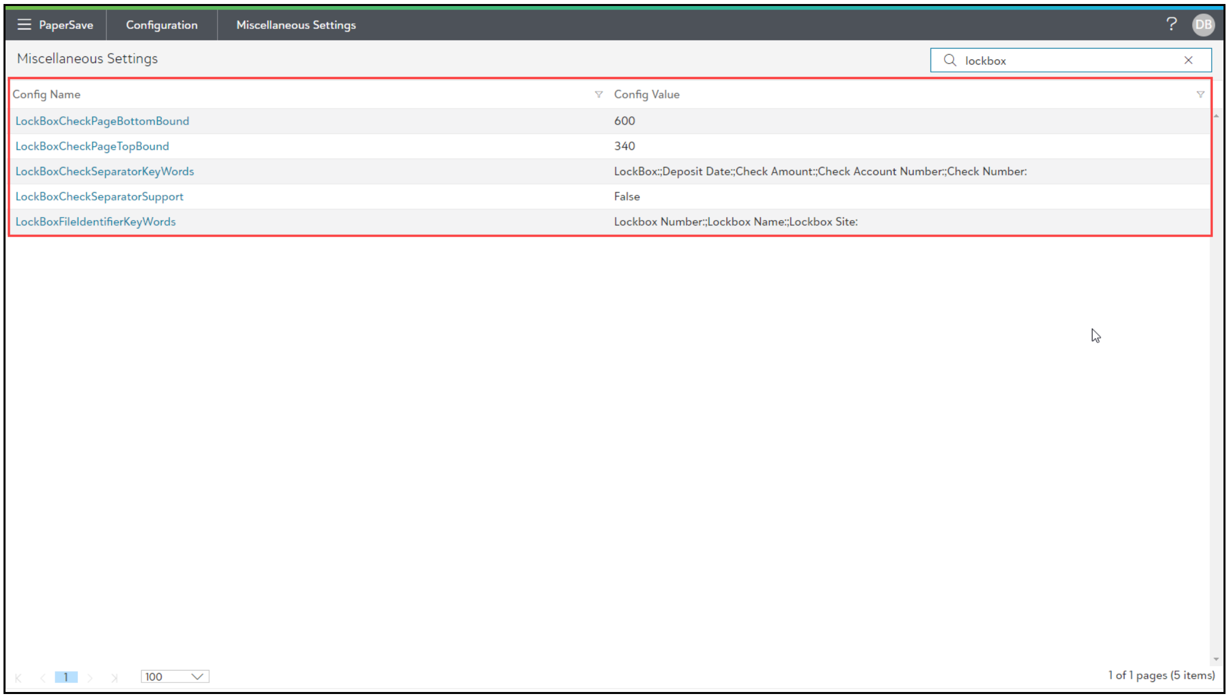
Tip: To save the updated value, you can either click on **X** in the dialog box or press **Esc** from the keyboard. To exit the Miscellaneous Settings, press **Esc** from the keyboard or click on **Configuration** from the breadcrumbs available in the application bar.

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

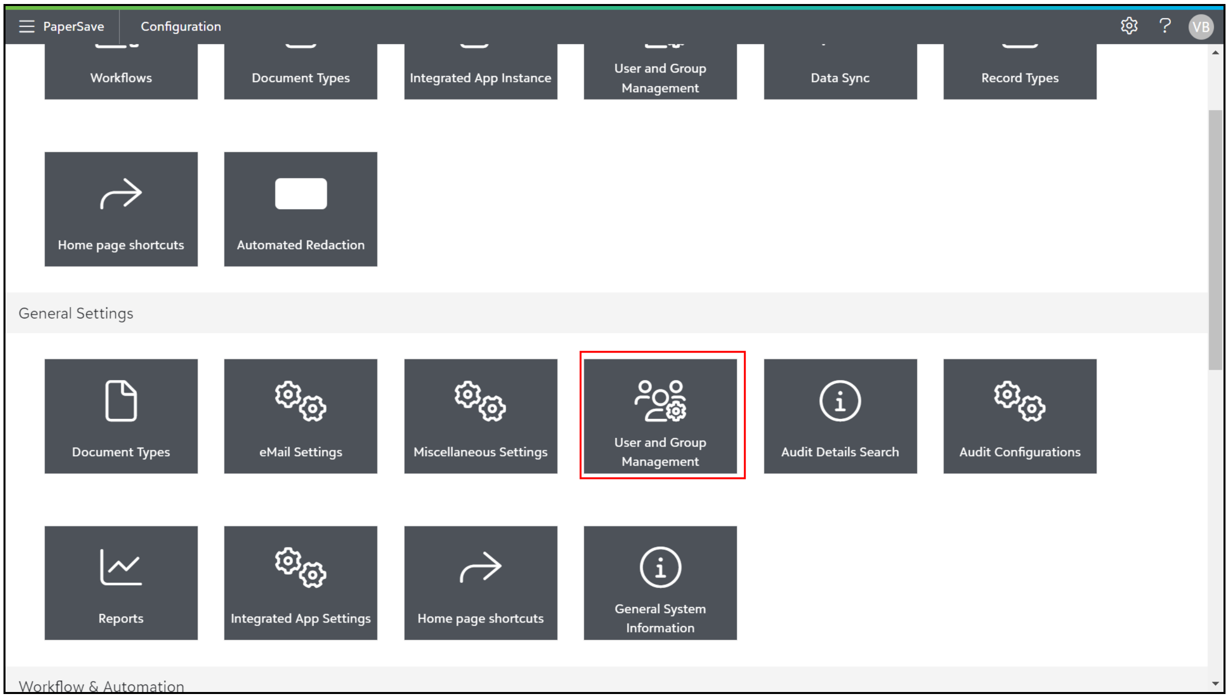


User and Group Management

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.

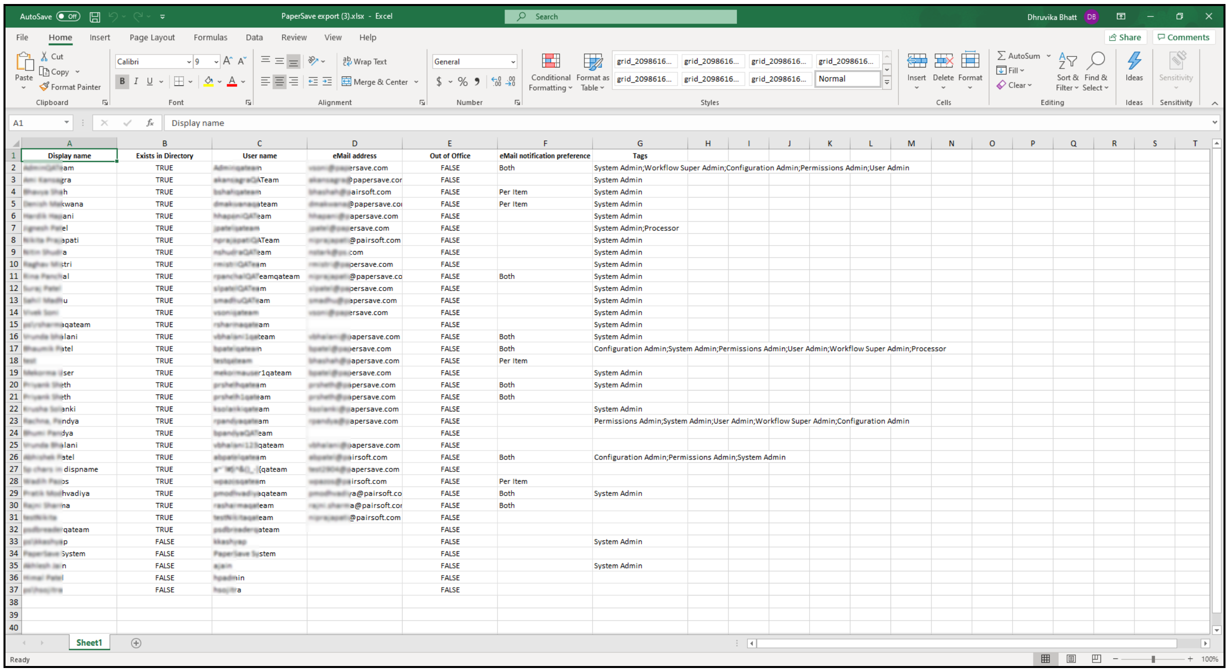
Managing User

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.

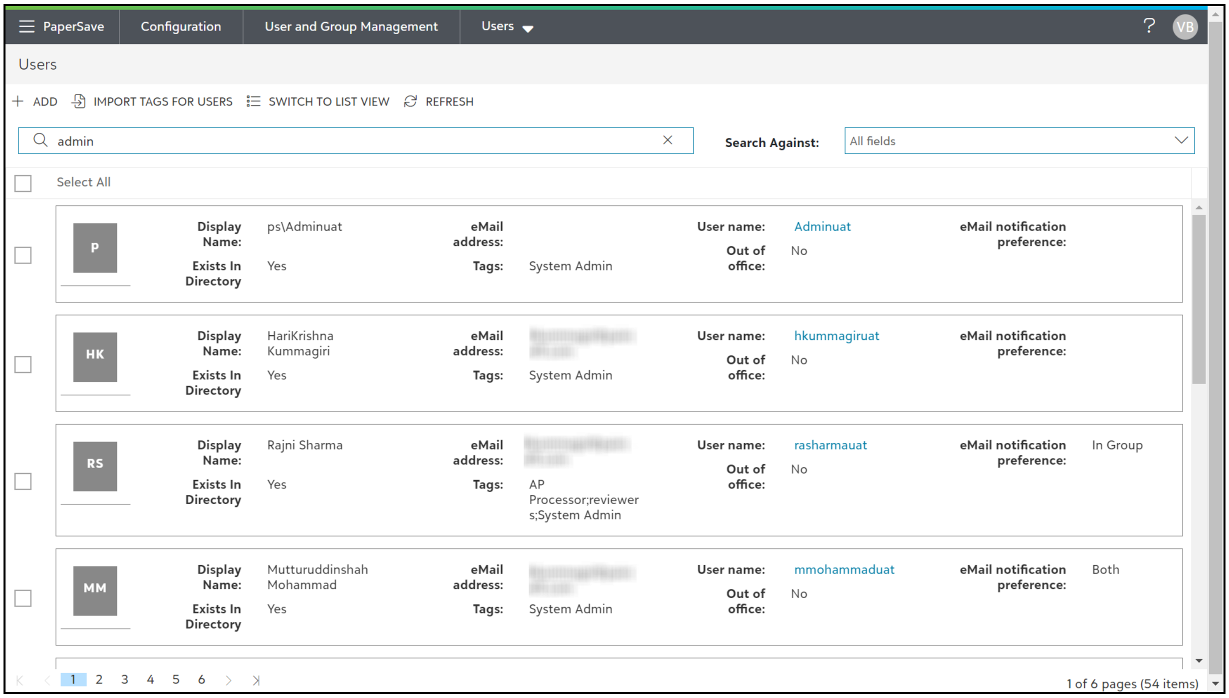


- **IMPORT TAGS FOR USERS**: You can import the tags for specific users from a .CSV file with a predefined format (having two columns titled Username and tags separated by semicolon). Once you upload the file in the predefined format, the data from the file will be added to the Users list.

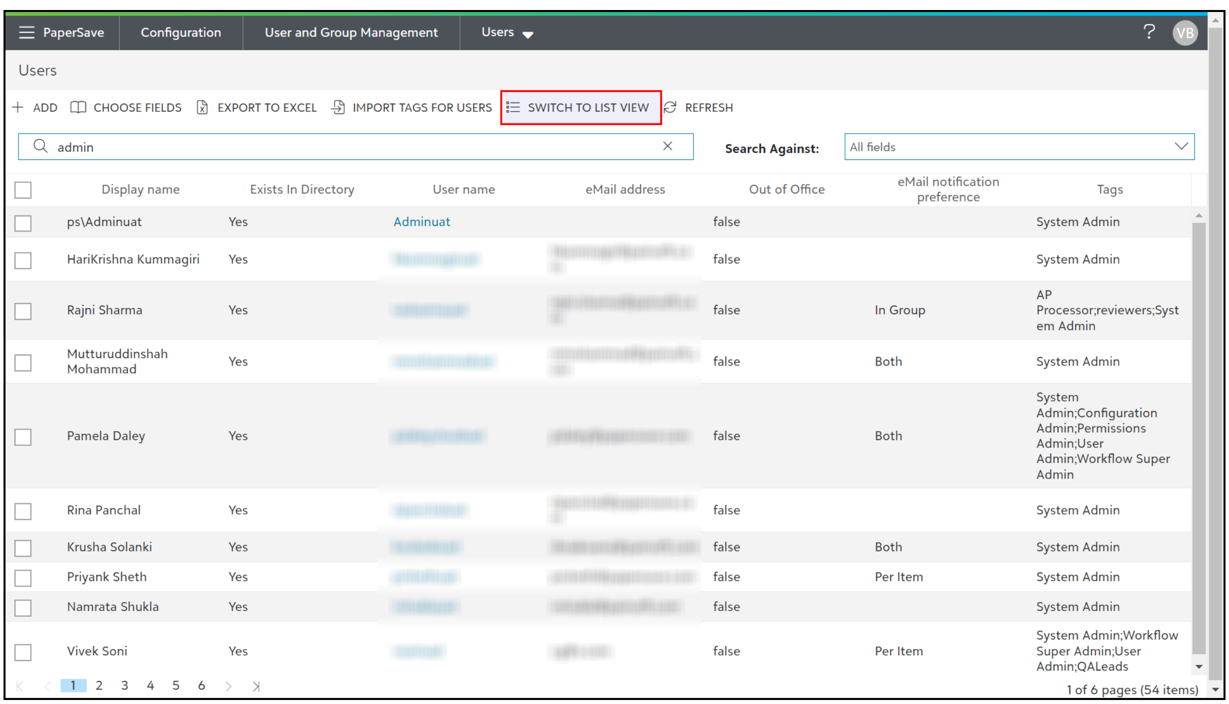
  1) Click on **IMPORT TAGS FOR USERS**. Select your CSV file from the dialog box and click on **Open**.

  2) Once you upload the file in the predefined format, the data from the file will be added to the Groups list.

- **SWITCH TO LIST VIEW**: Click on this option to view the list of users in the List view, as shown in the below screen.



- **SWITCH TO CARD VIEW**: Click on this option to access the list of User details in Card style, as shown in the below screen.



- **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	[illegible]hil	Configuration Admin							
3	[illegible]pend Users keyword I	[illegible]ers Keyword	Configuration Admin;Permissions Admin;System Admin;User Admin							
4	[illegible]oup100	[illegible]	Configuration Admin							
5	[illegible]test1	[illegible]	System Admin							
6	[illegible]test2	[illegible]	System Admin							
7	[illegible]_Users	[illegible]_Users	Configuration Admin;User Admin							
8	[illegible]sters	[illegible]sters	User Admin;Configuration Admin;System Admin;Permissions Admin;Workflow Super Admin							
9	[illegible]test	[illegible]	Configuration Admin;System Admin;Permissions Admin							
10	[illegible] Group	[illegible]A Group	Configuration Admin;System Admin							
11	[illegible]#	[illegible]Megha, Upate	System Admin							
12	[illegible]oup	testgroup	Configuration Admin							
13	[illegible]ltiple groups under I	Ax-Multiple groups under I								
14	[illegible]i123	test								
15	[illegible]oup12	Ax-Group12								
16	[illegible]oup69	Ax-Group69								
17	[illegible]oup70	Ax-Group70								
18	[illegible]oup72	Ax-Group72								
19	[illegible]oup73	Ax-Group73								
20	[illegible]oup74	Ax-Group74								
21	[illegible]Group									
22	[illegible]oup75	Ax-Group75								
23	[illegible]oup76	Ax-Group76								

- **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

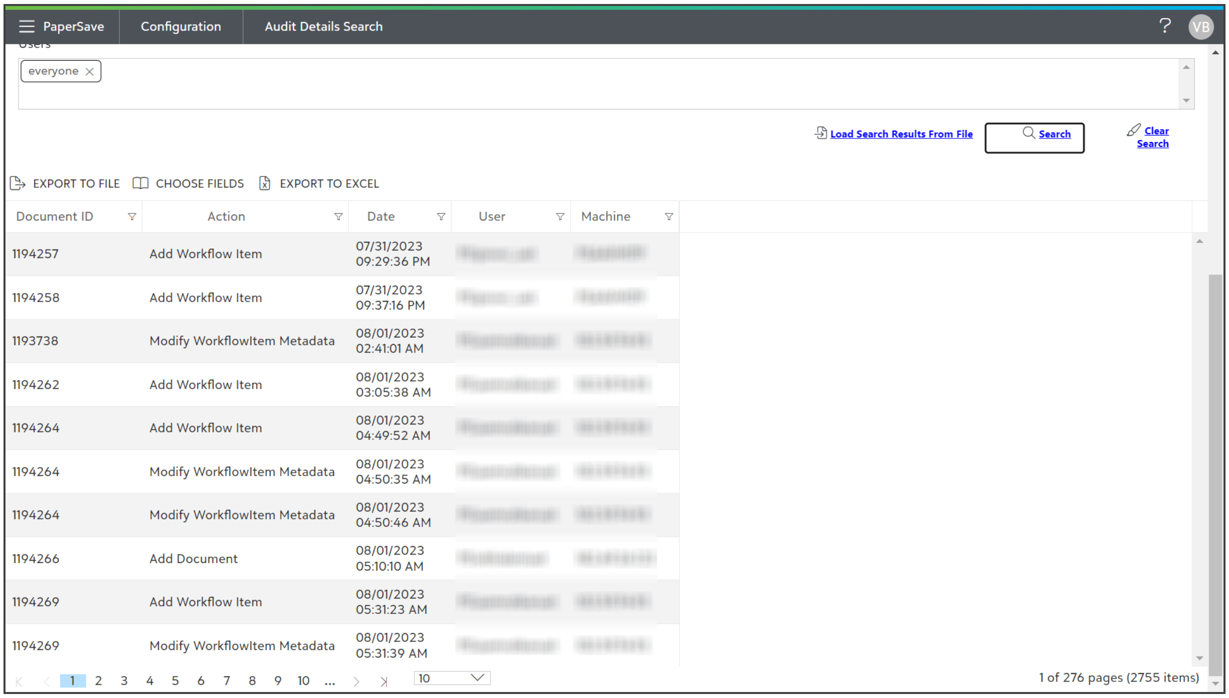
This module enables you to view the audit details for various actions performed in PaperSave by selected users for a specific date range.

> **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:



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.

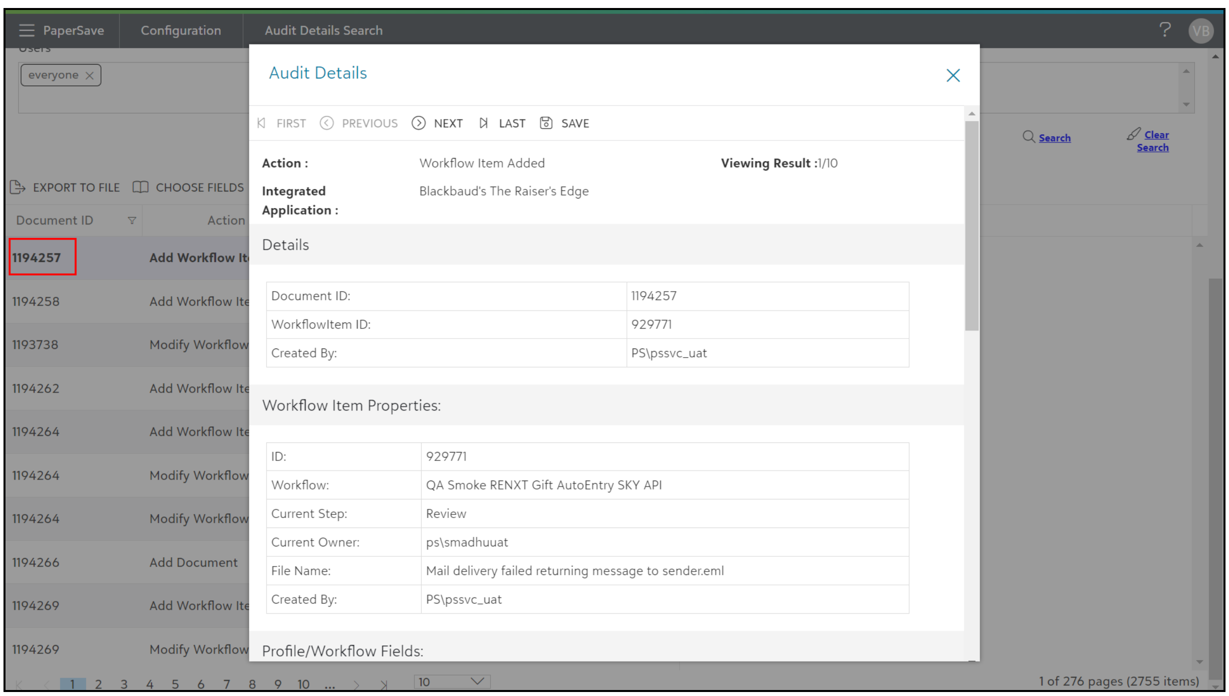
2) Audit Details dialog box will appear. Here you will see a toolbar with navigation buttons to move between items in the audit details results list.

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

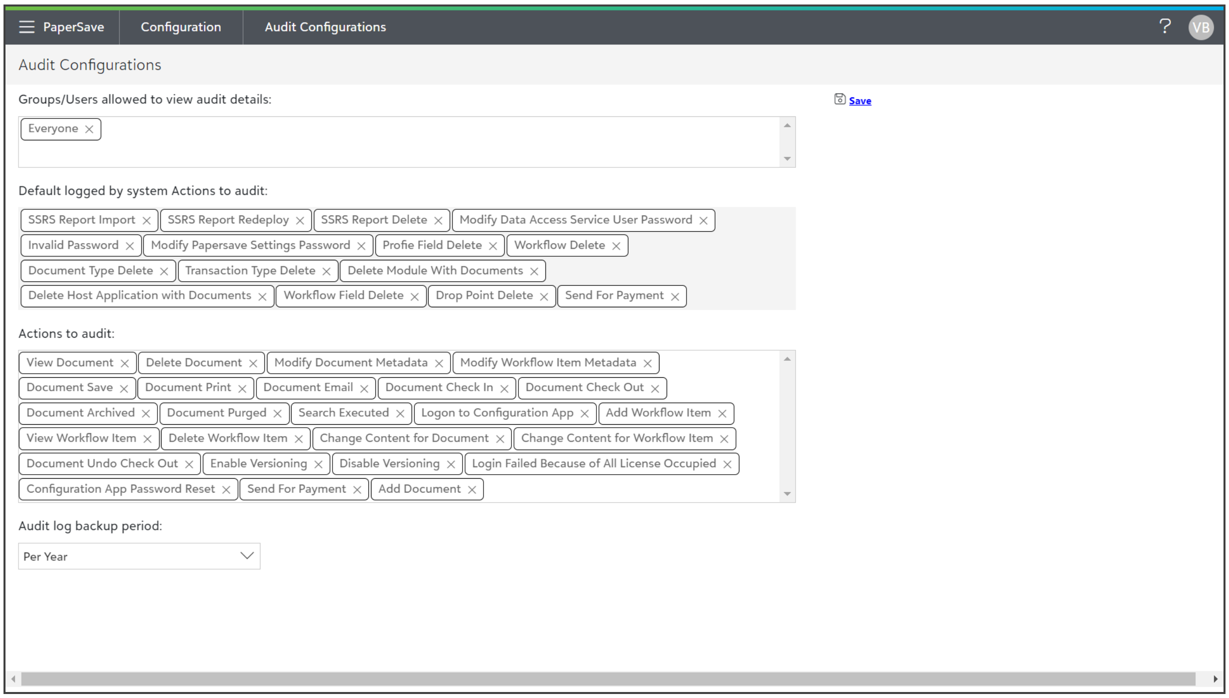
This section facilitates you to define the preferences for your PaperSave related audit logs. In this module, you can configure the Group/Users allowed to view the details, which system actions to audit, and the audit log backup period.

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.

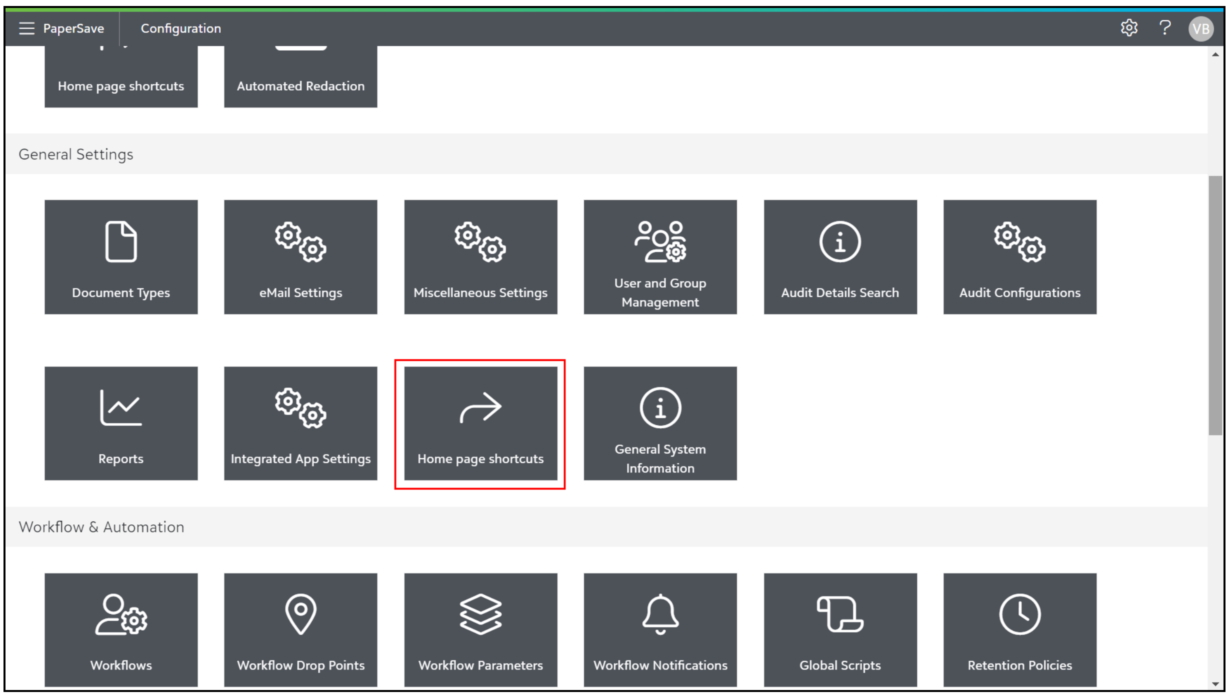
Integrated App Settings

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:

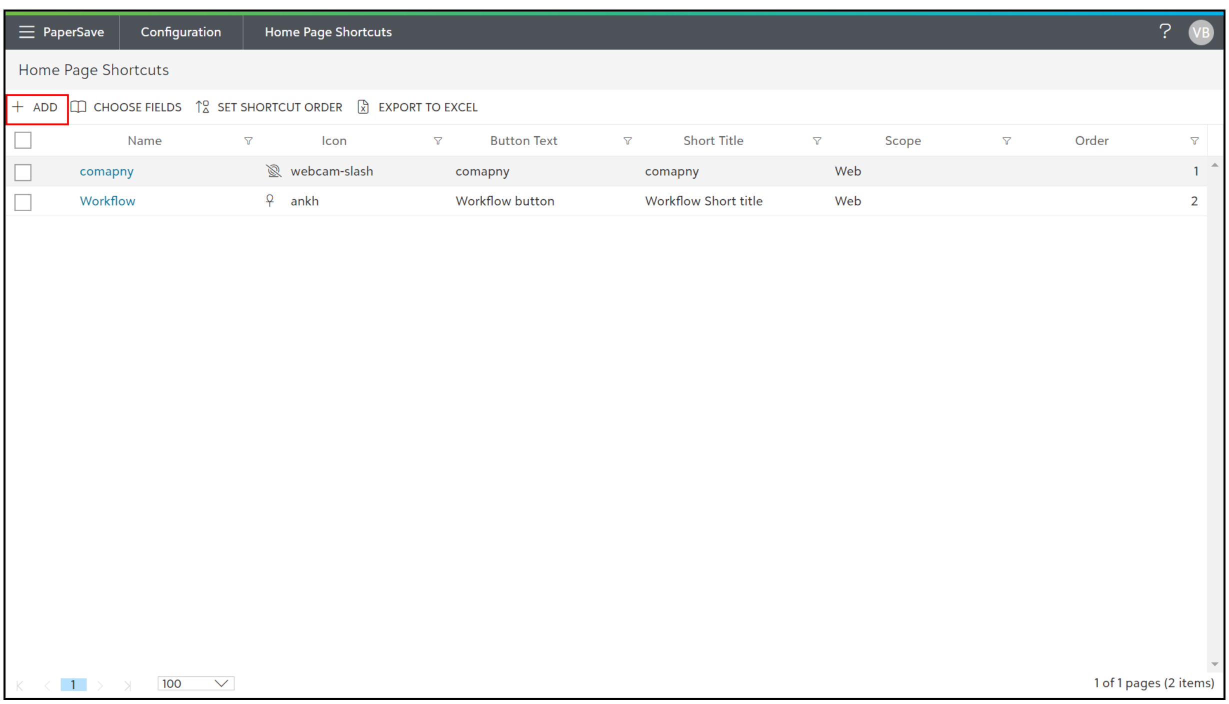
- Adding Home page shortcut
- Managing Home page shortcut
- Set Shortcut Order
- Deleting Home page shortcut

Adding Home page shortcut

The following are the steps to add a custom shortcut to PaperSave Home:

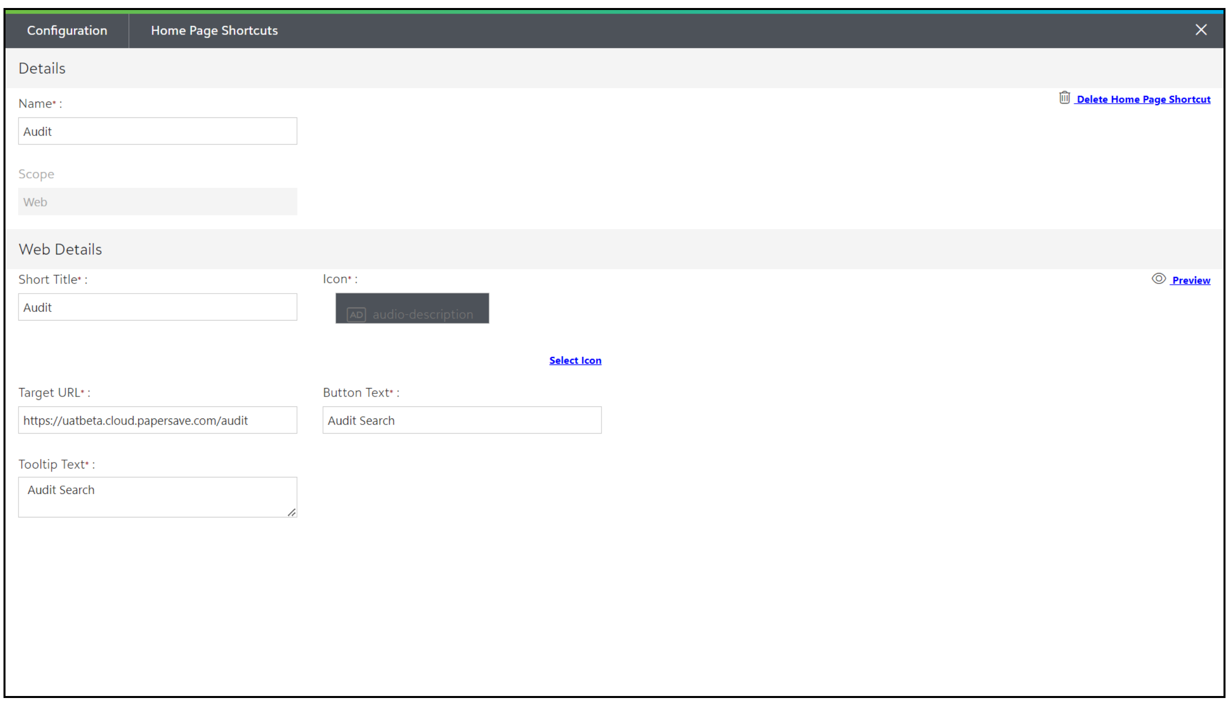
1) Click on the **Home page shortcuts** tile in the General Settings section of the Configuration Area.

2) Click on the **+ADD** option from the list toolbar as shown in the below screen.



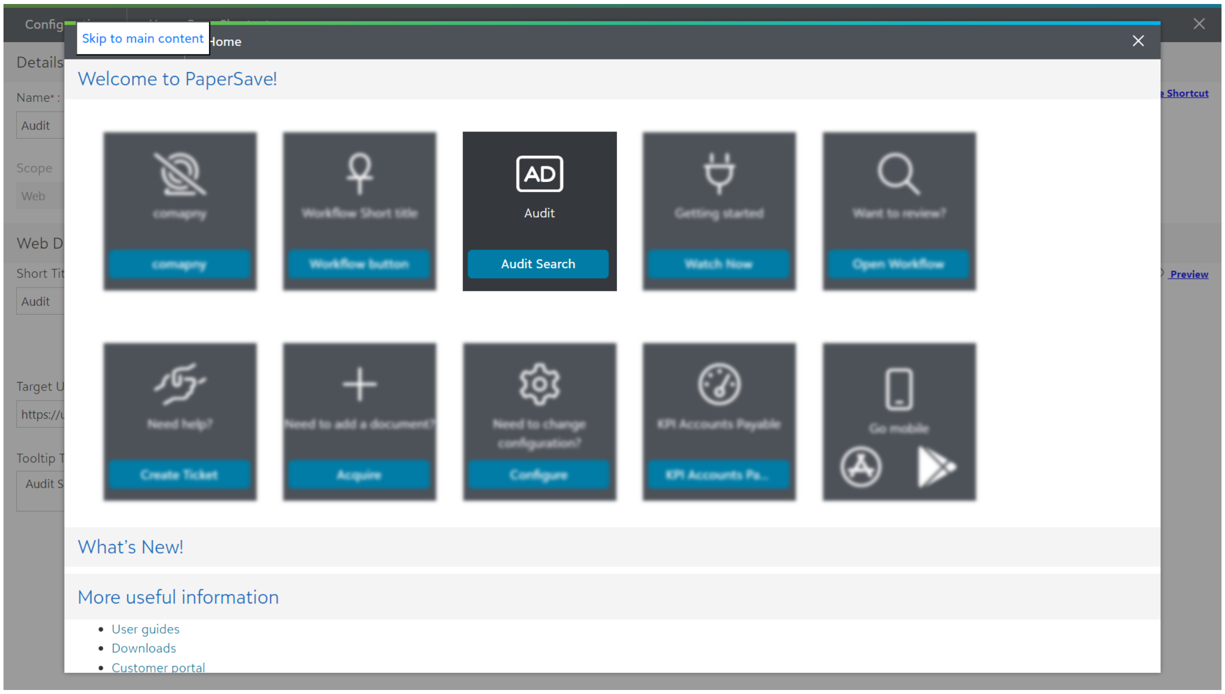
3) Now, enter all the required details to create the shortcut.

- **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.



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.

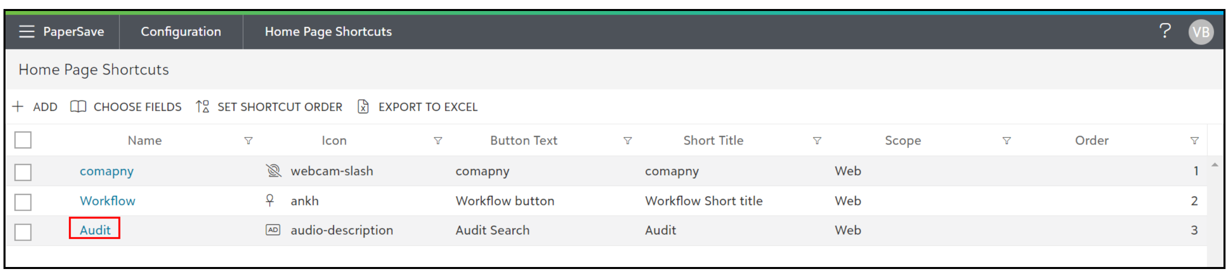
> **Note:** By default, new shortcut tile will be added before the pre-defined shortcuts and after the existing user-defined shortcut(s). You can change the order of the custom shortcuts by using the **Set Shortcut Order** option.

Managing Home page shortcut

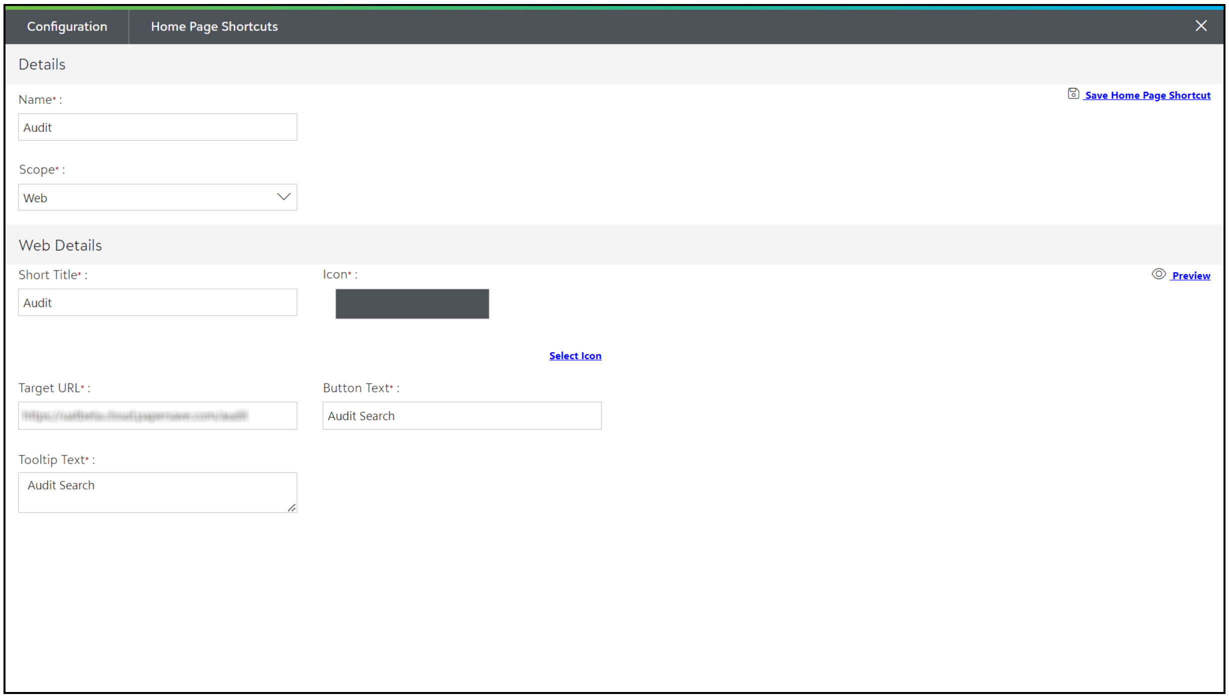
The following are the steps to edit an existing custom Home page shortcut(s) details:

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.



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.

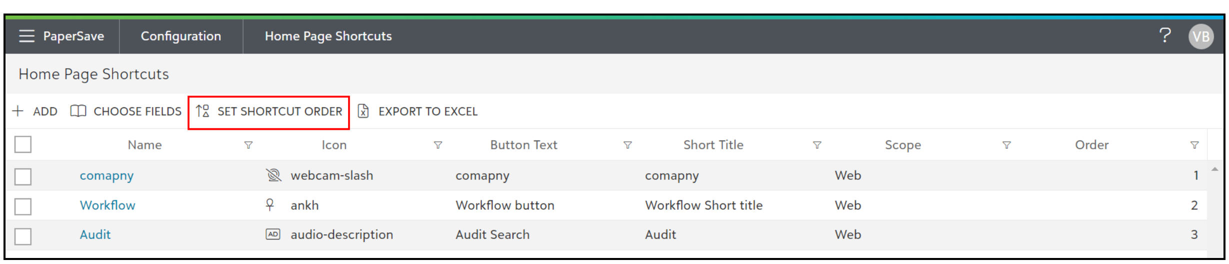


Set Custom Shortcut Order

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.

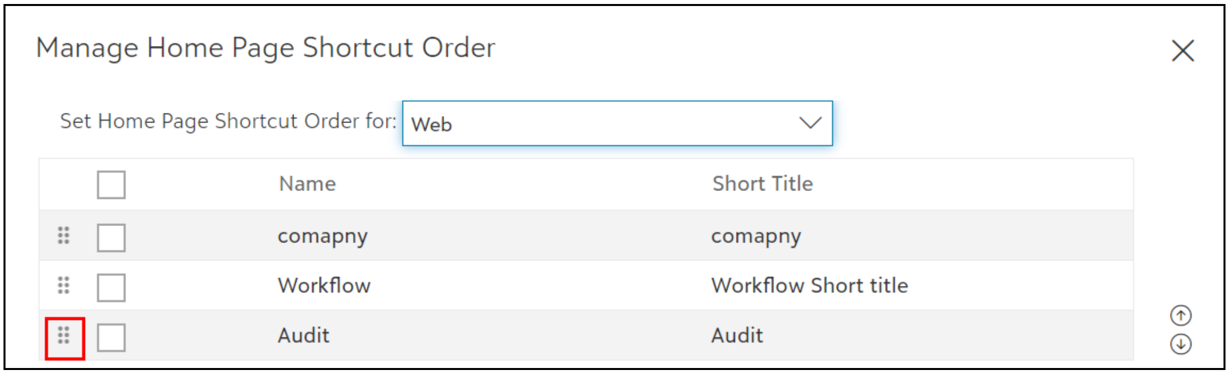


2) The **Manage Home Page Shortcut Order** dialog box will appear as shown in the below screen.

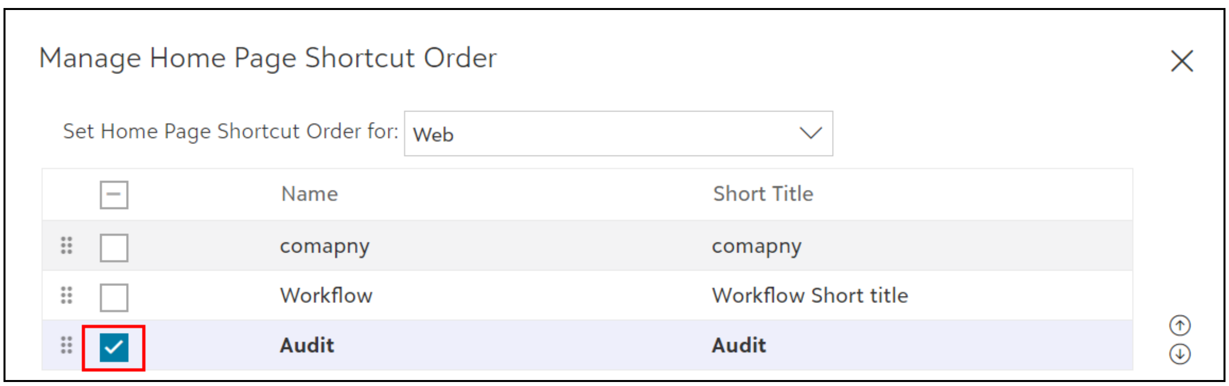
3) Select the scope from the "Set Home Shortcut Order for" drop down list to view the related shortcut list.

4) To change the order of the shortcuts, you can use either of these ways:

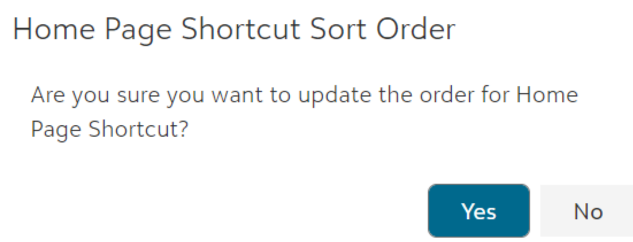
- **Drag** the shortcut using the **Ellipse** icon as shown in the below screen.



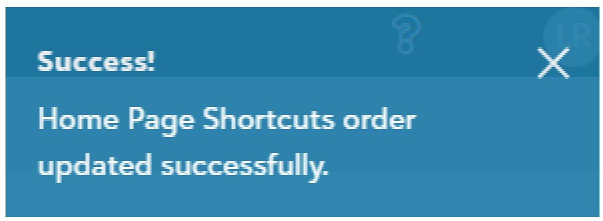
- **Select** one or more rows and move them using the arrow keys in the lower right-hand corner of the dialog box, as shown in the below screen.



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.



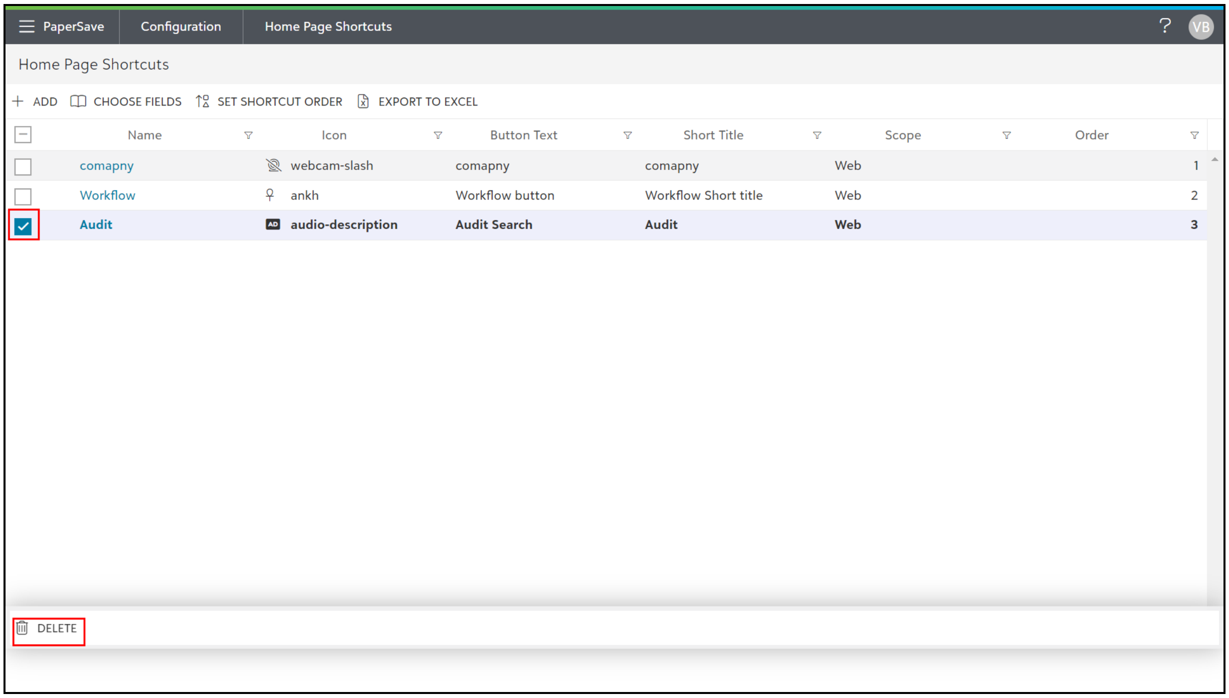
6. If the order is updated successfully, you will see a success message notification in the top-right corner. Else, it will show the failure message notification.



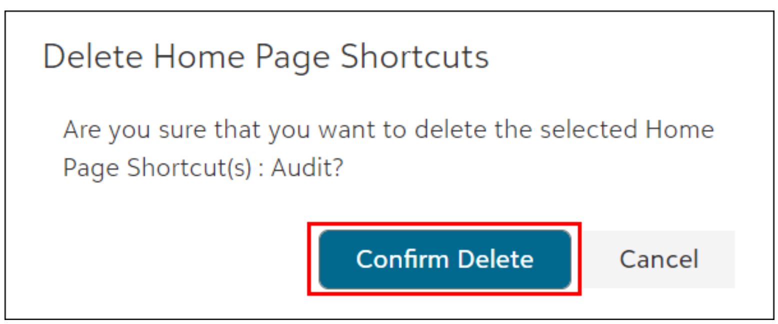
Deleting Home page shortcut

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.

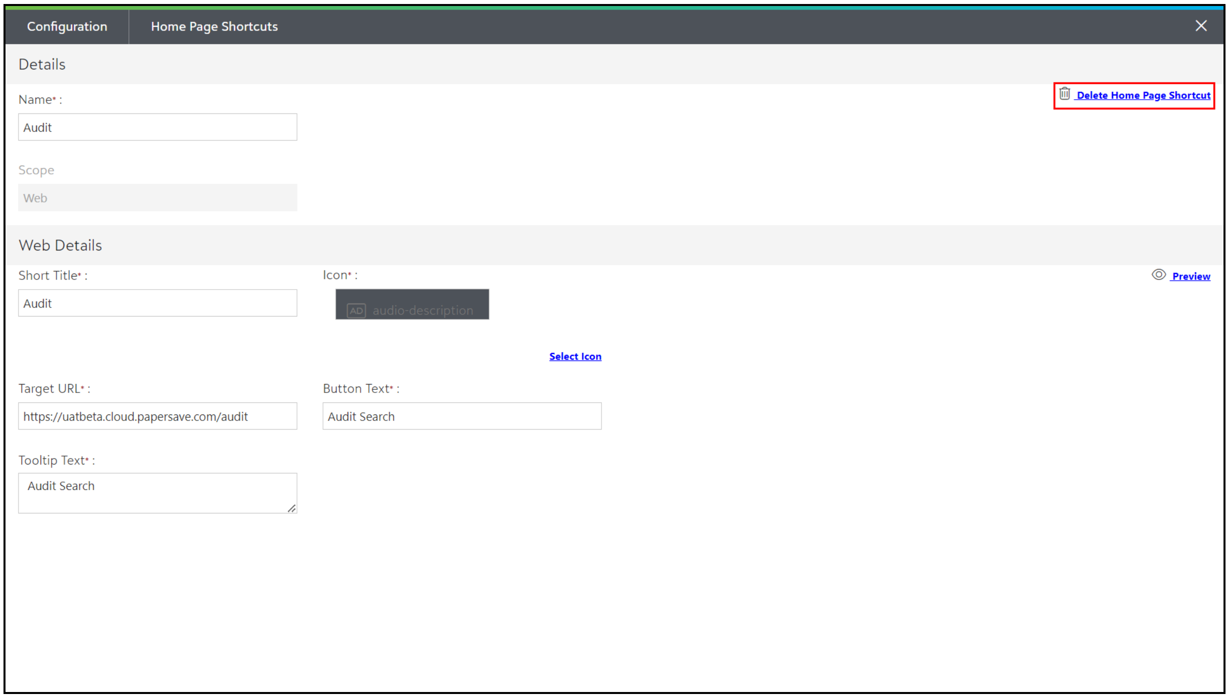


- Once you click on the **Delete** option, a confirmation message will appear, as shown on the below screen.

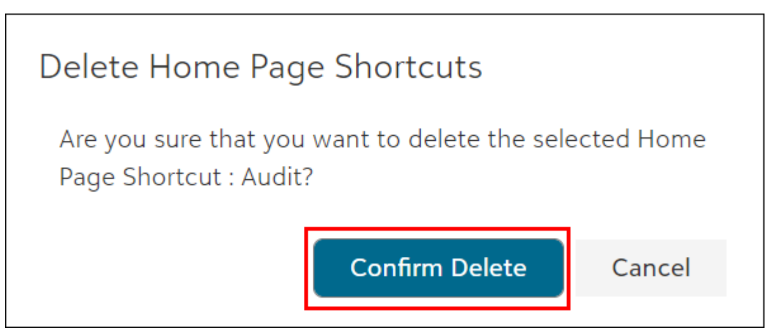


- Now, click on the **Confirm Delete** button if you want to perform a delete operation, or click on the **Cancel** button to abort.

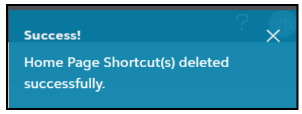
2) On the other hand, you can also open any existing shortcut and click on the **Delete Home Page Shortcut** option in the upper-right corner as shown in the below screen to delete a specific home page shortcut.



- Once you click on the **Delete Home Page Shortcut** option, a confirmation message will appear, as shown on the below screen.



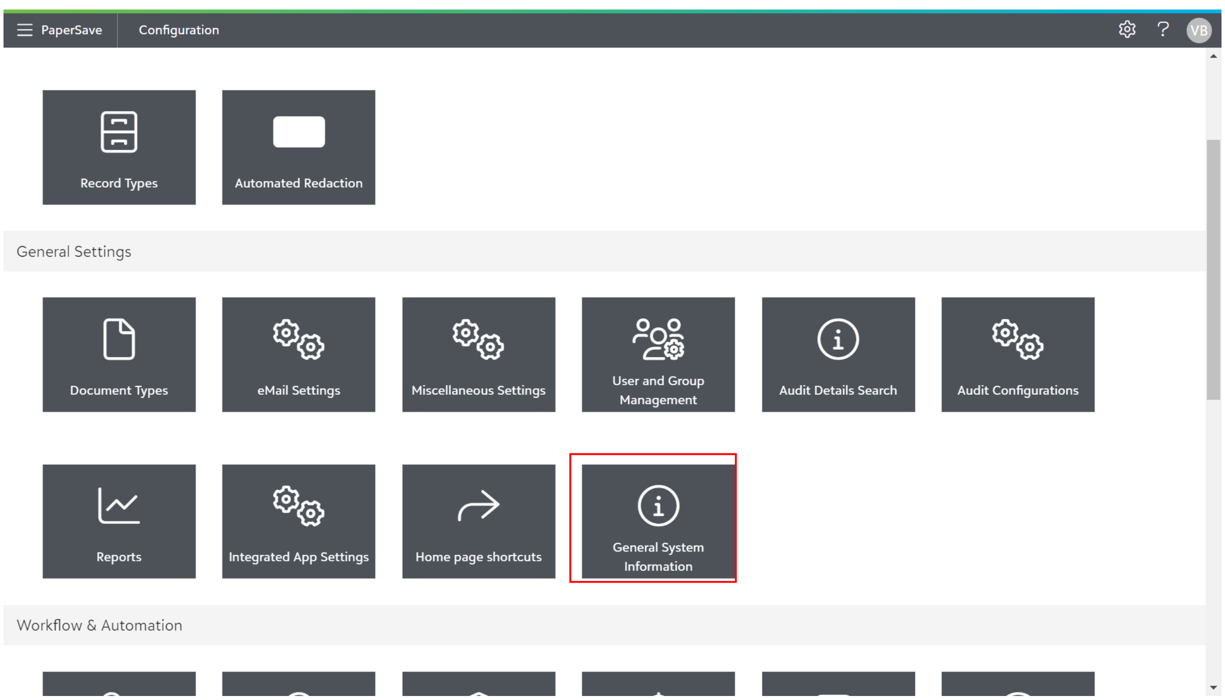
3) Now, click on the **Confirm Delete** button to perform the delete operation or the **Cancel** button to abort. Once the Home page shortcut is deleted, it will show success toast notification as shown below.



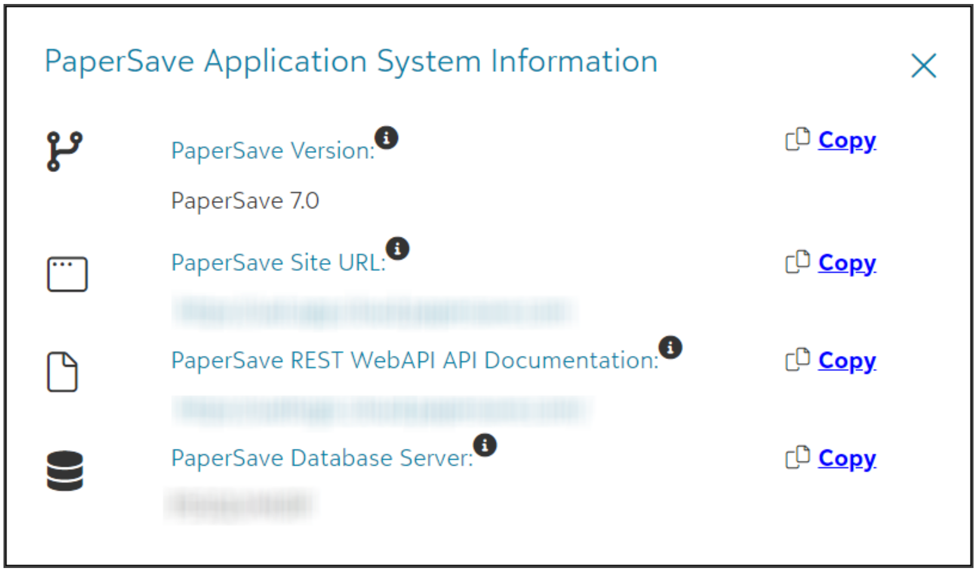
General System Information

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.



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:

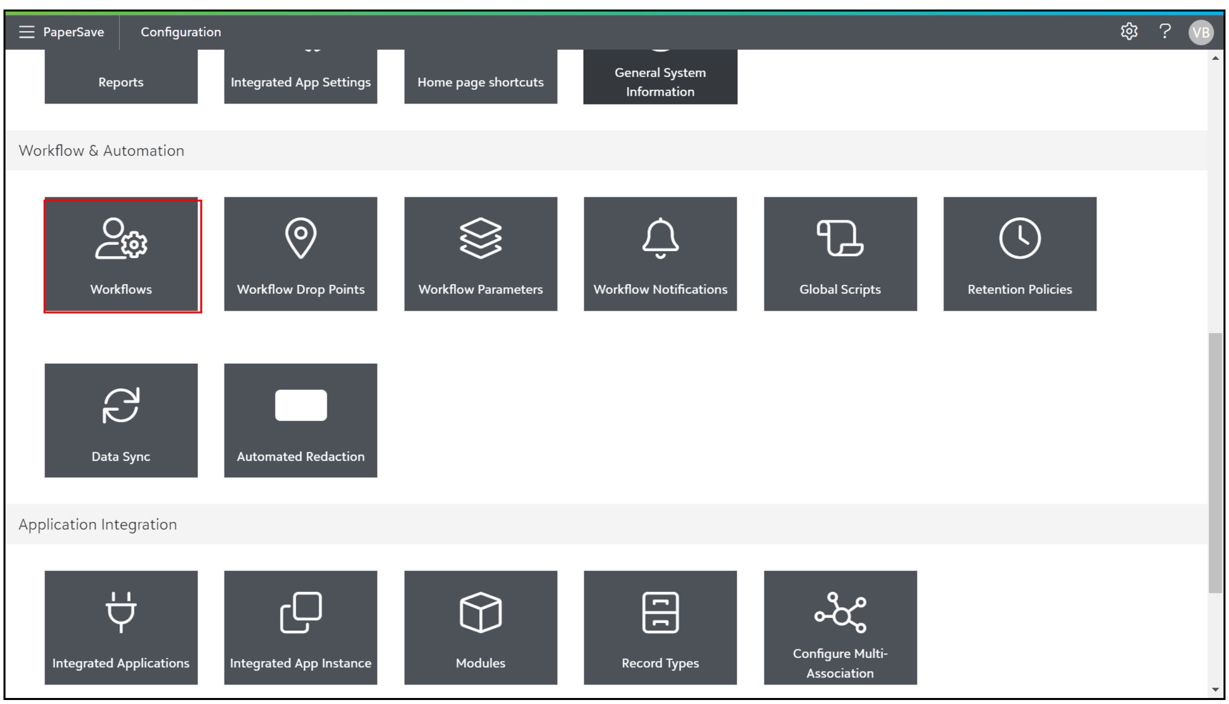
- Workflows
- Workflow Drop Points
- Workflow Parameters
- Workflow Notifications
- Global Scripts

- 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

Watch the video to know how to create a workflow.

Workflow Designer

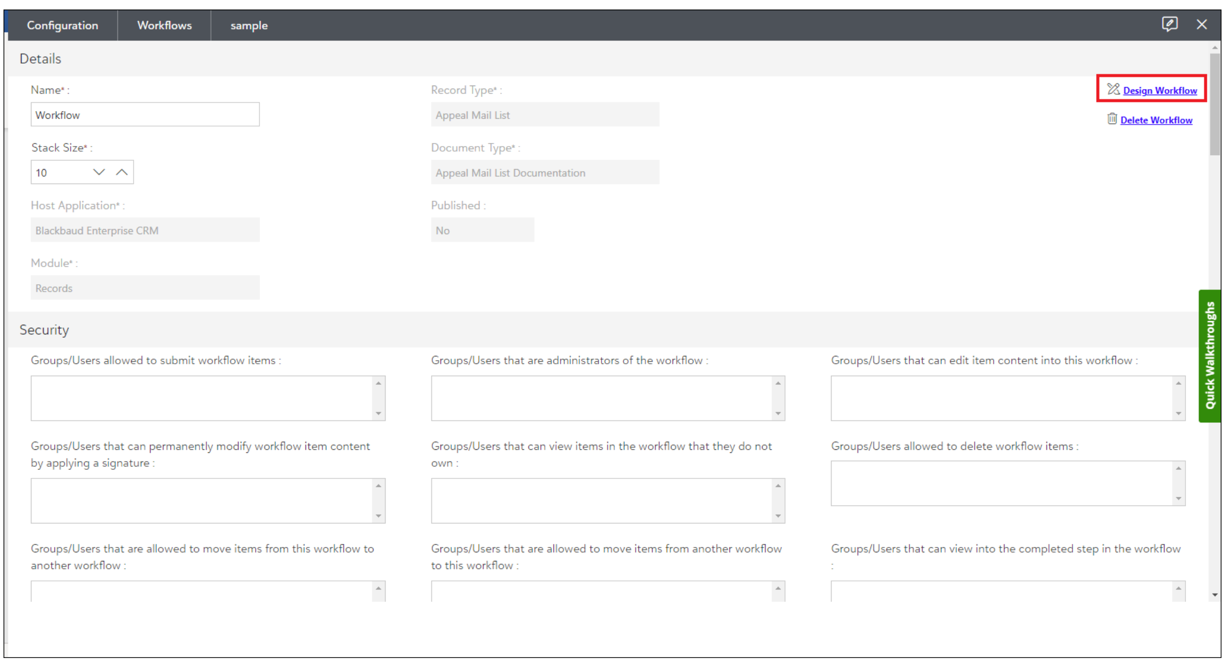
A PaperSave workflow can be created either by using predefined Workflow templates or by creating a custom workflow using the various options provided.

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.



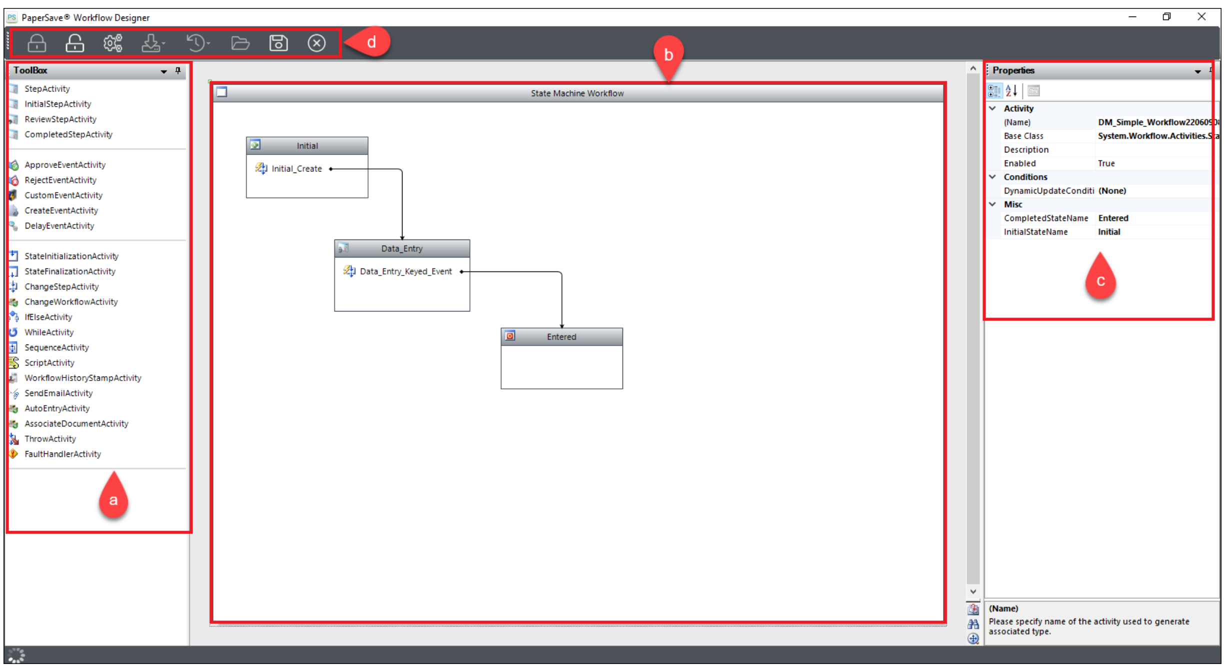
2) PaperSave Workflow Designer screen appears. Workflow Designer screen has the following four main components:

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.

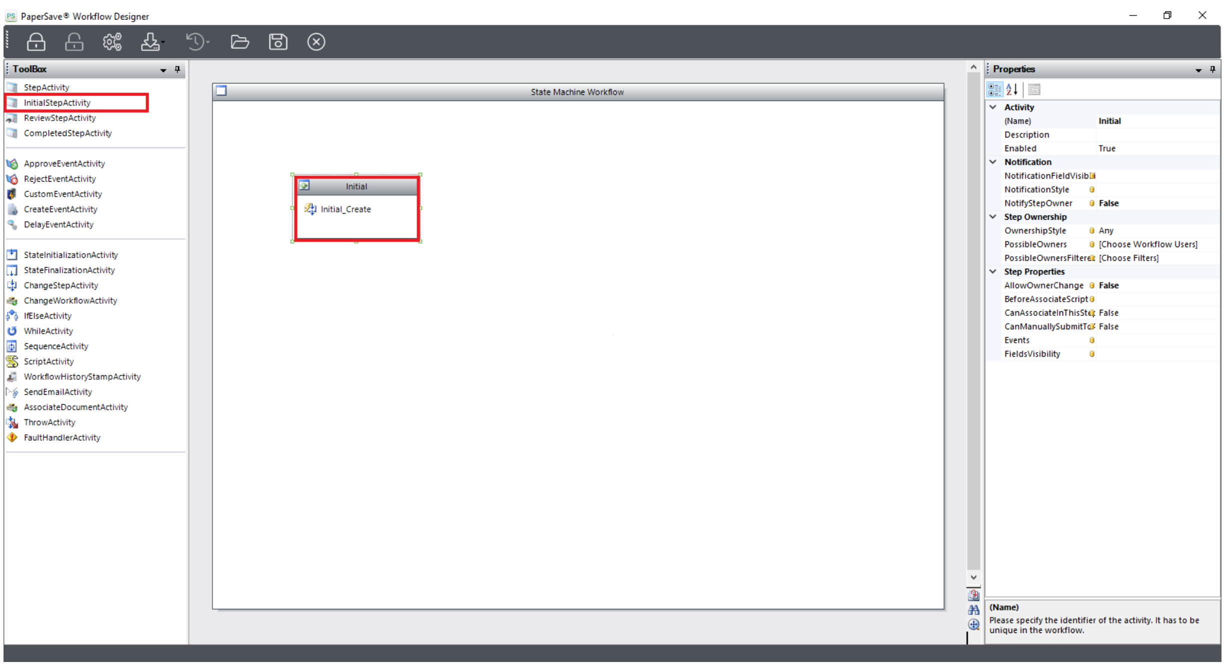


Designing a Workflow

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.

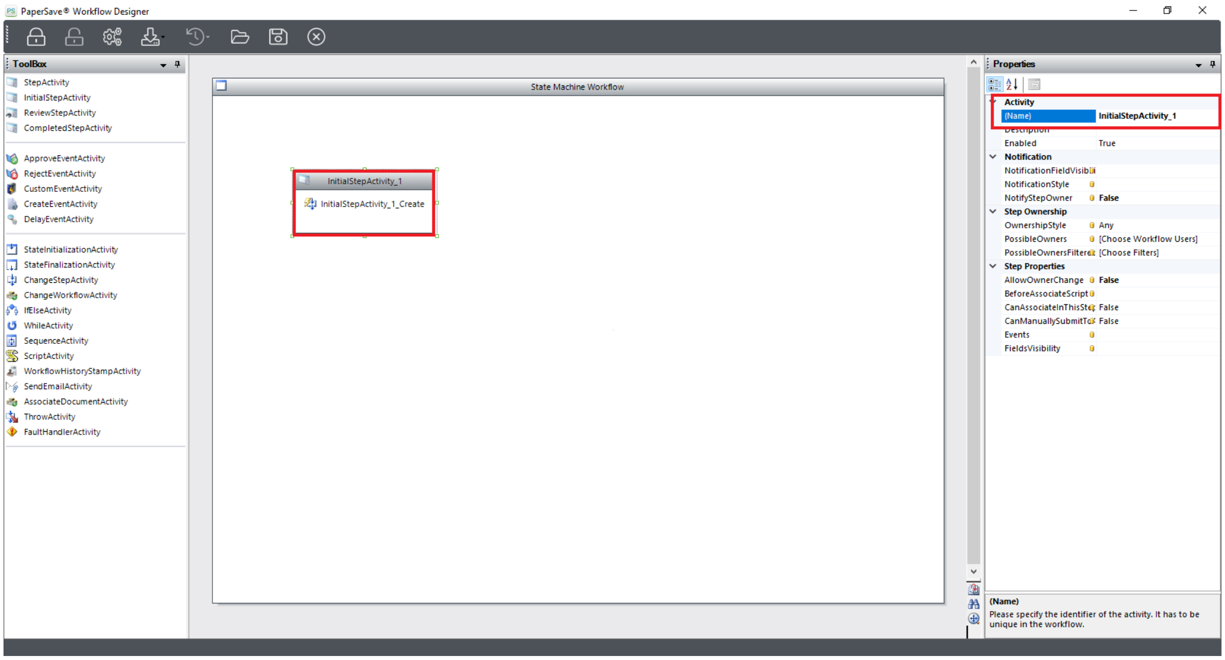
If you want to design a workflow from scratch, then do the following:

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.



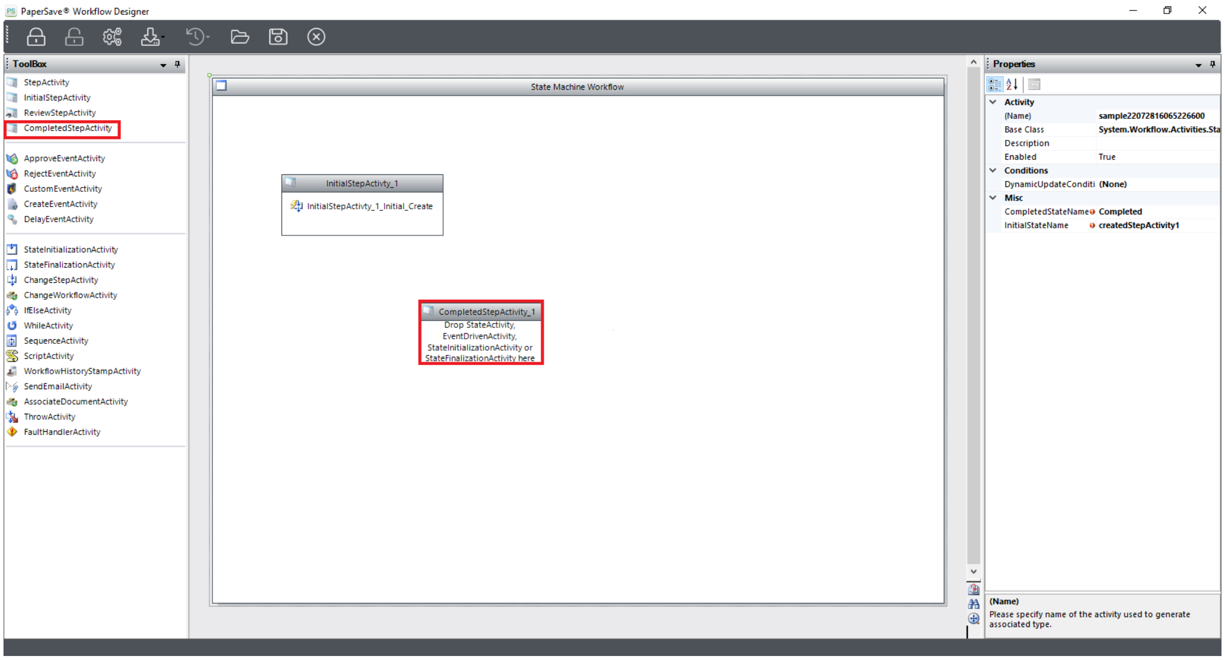
> **Note:** If you are using a predefined Workflow Template, then all activities will have predefined events.

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.

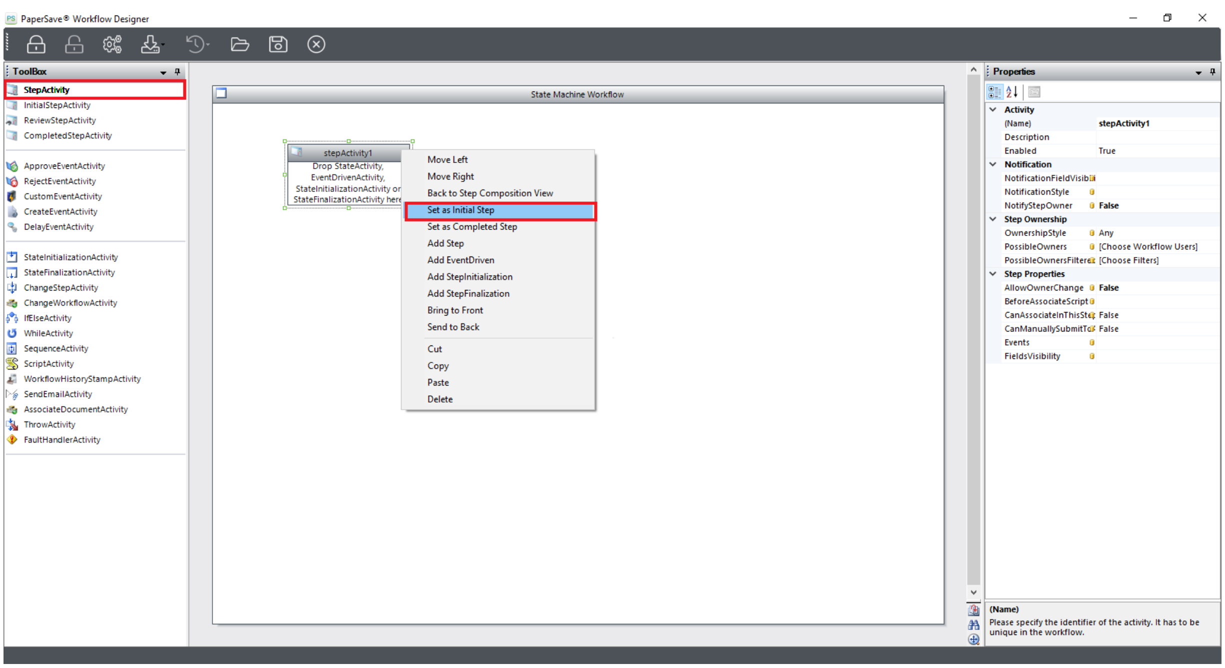


> **Note:** Make sure that the name must not contain any space, or you may use an underscore between the words.

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.

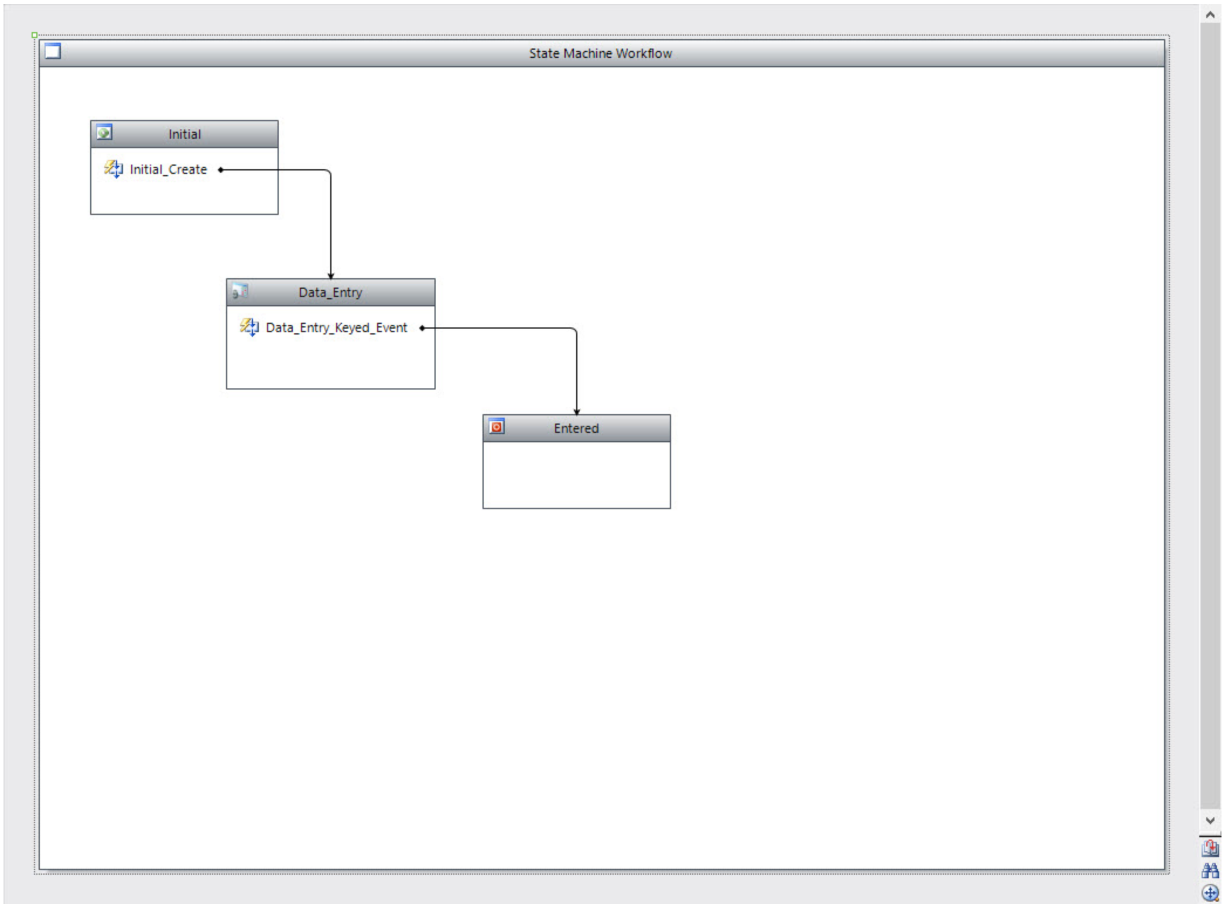
5) The steps you choose to create between the Initial Step and the Completed Step depend on the process for the Workflow. Each step in the workflow represents a step in the process, external actions, or activities events that cause an item to change step or transition a document from one step to another. 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.

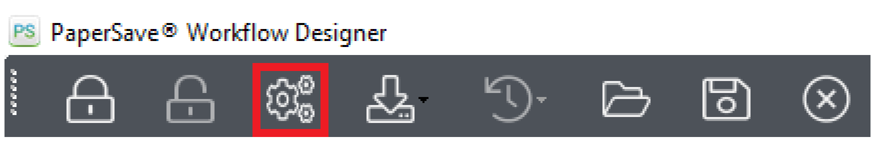
There are items within each event that performs a specific action. Click here to know more about the Steps and Activities.

> **Tip:** When creating a Workflow from scratch, it is usually easier to create all the Steps before defining all the actions.

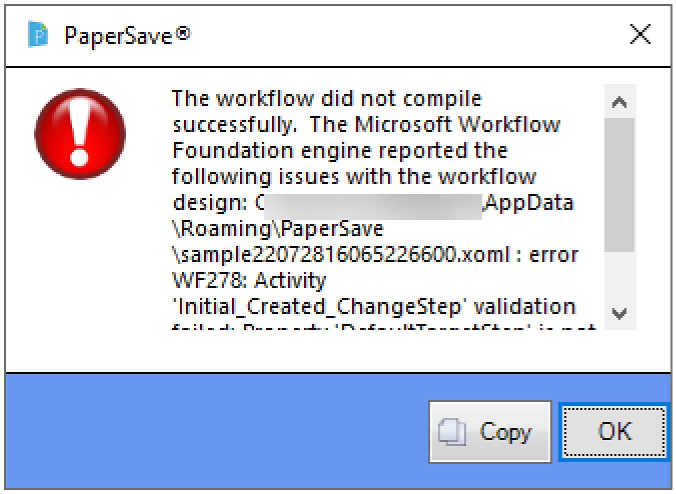
7) After creating the workflow step activity, you may now link the stepactivities with each to define the sequence of the stepactivities by bringing the cursor near the event activity and dragging and dropping the green dot from the first workflow step to the next workflow step, as shown in the below image. Similarly, you may connect other workflow steps.



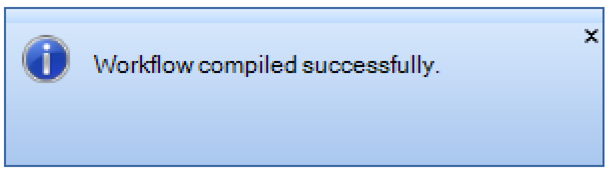
8) Once the Workflow is designed, you can compile the Workflow to check whether it is correct or not. To compile a Workflow, click **Compile Workflow** on the toolbar.



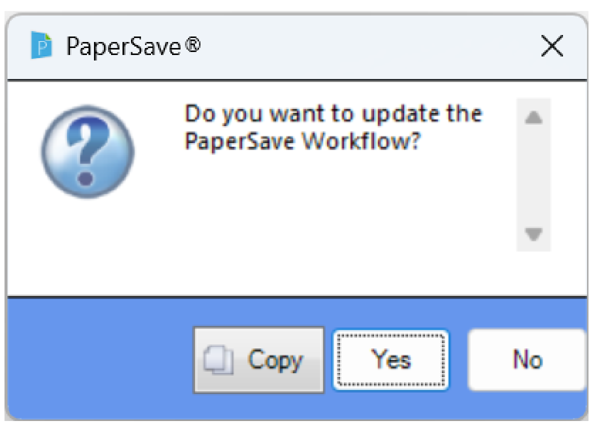
If the Workflow is not compiled successfully, then the following type of message will appear.



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.

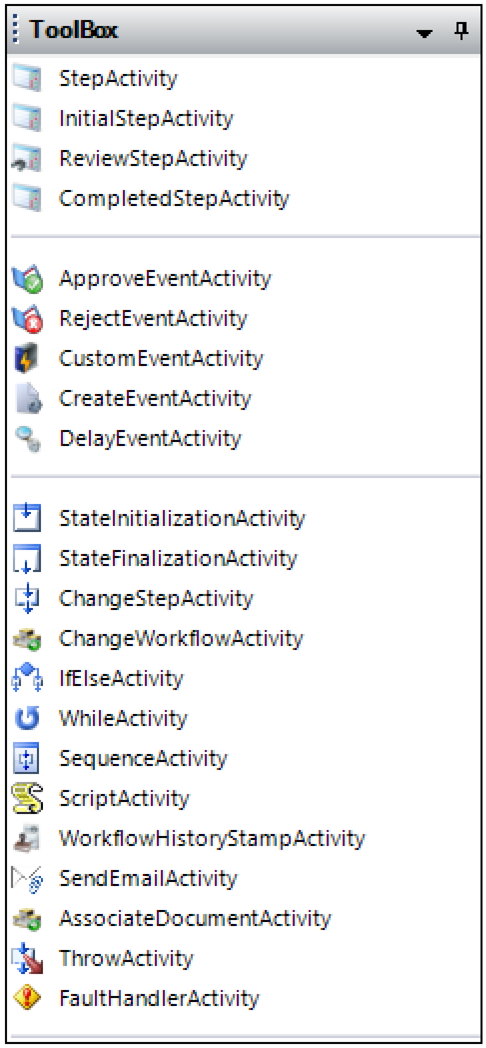


The following topics are covered in this section:

- [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.

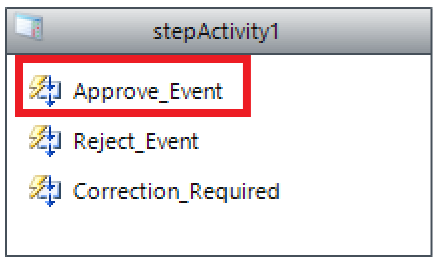
b) **InitialStepActivity**: A Step Activity contains an Event-Driven Activity named an Initial Step Activity. It includes a Target Step to identify the step you want the item to go to upon the Create Event.

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.

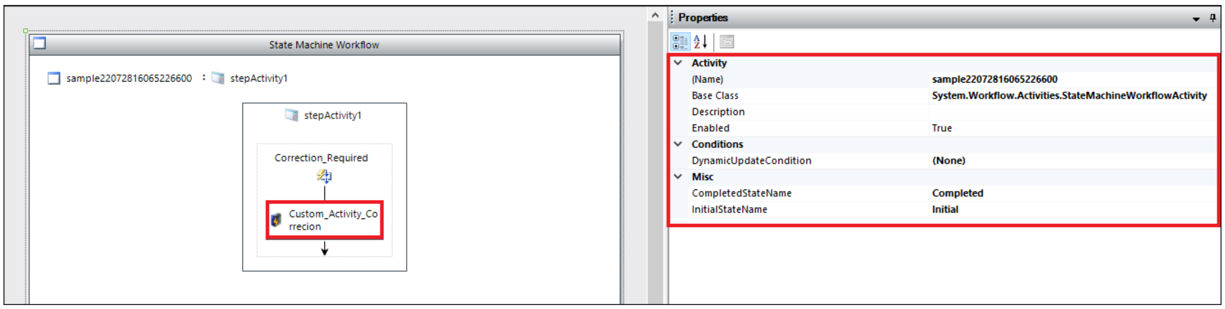
b) **RejectEventActivity**: This is a Reject activity, used to reject the Workflow Item and stop moving it to the next stage of the Workflow.

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.

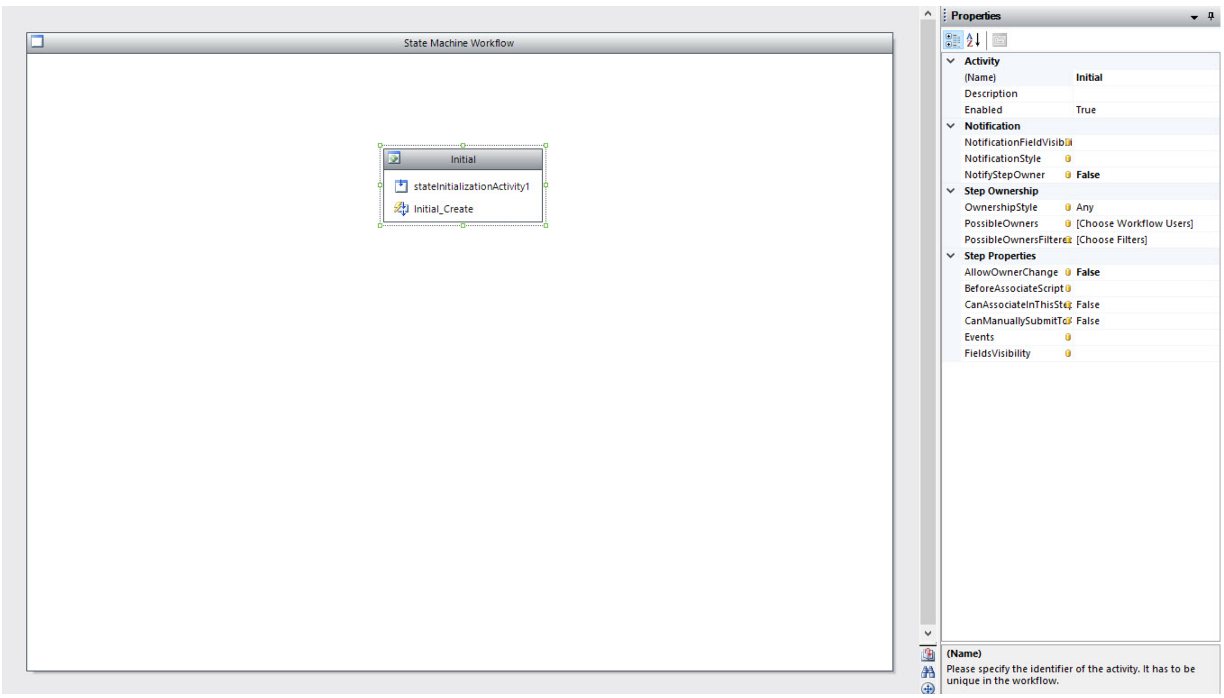
The following topics are covered in this section:

- Step Activity
- Event-Driven Activity
- Activity
- Contextual Menu

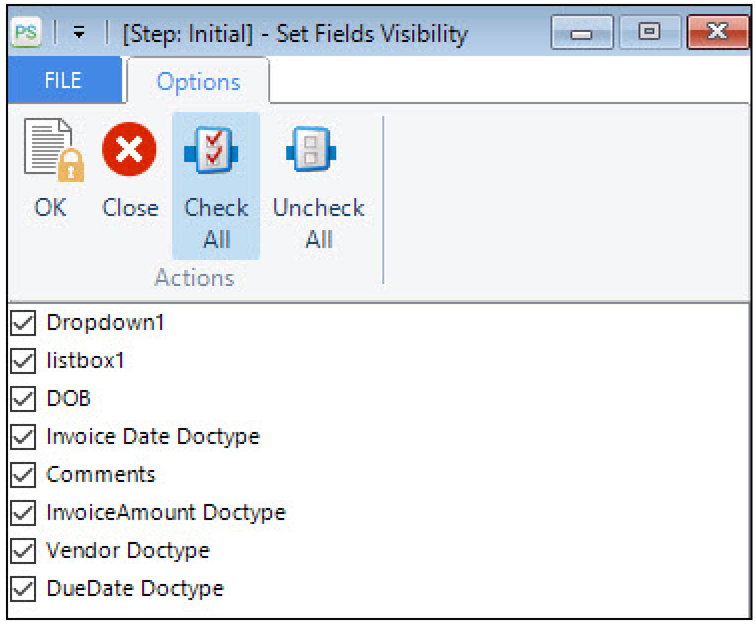
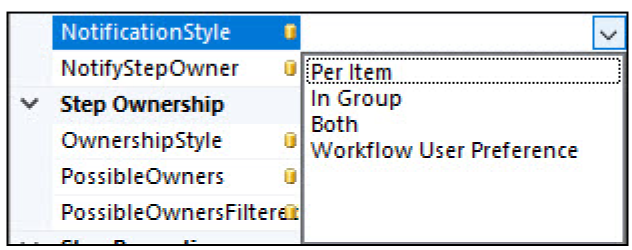
StepActivity Properties

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.



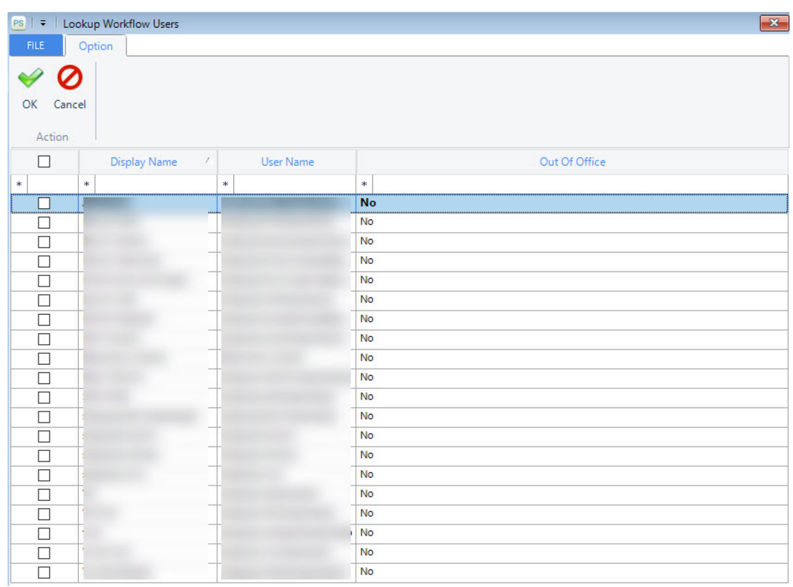
Property Name	Description
Name	Enter the name that you want to give to the step activity and is displayed as a raise event button name.
Description	Enter the description to describe the step activity.
Enabled	You can enable a step activity to allow it to perform an action by setting its property to “True” 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-

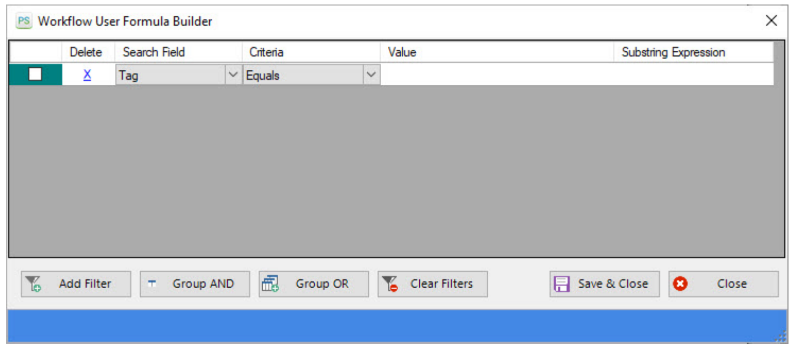
<table>
<tr>
<td></td>
<td>down list. You can select any of the below-given options from the drop-down list. By default, the “Any” option is selected under the OwnershipStyle drop-down list.

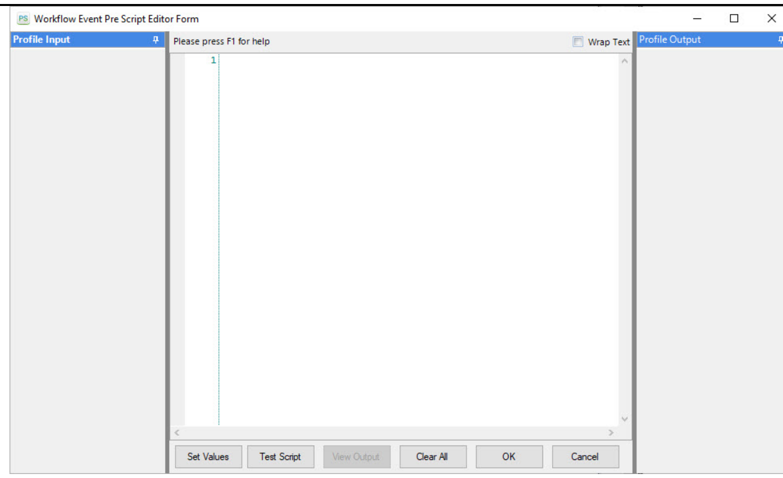
Any: If this option is selected then any Workflow User can act as the owner of the current step.
Possible Owners Filtered by Tag: If this option is selected then the owner of the step can only be from the possible owners evaluated using the FilterByTag option.
Specific List of Possible Owners: If this option is selected then the owner of the step can only be from the specific list of users set under the Possible Owners option.

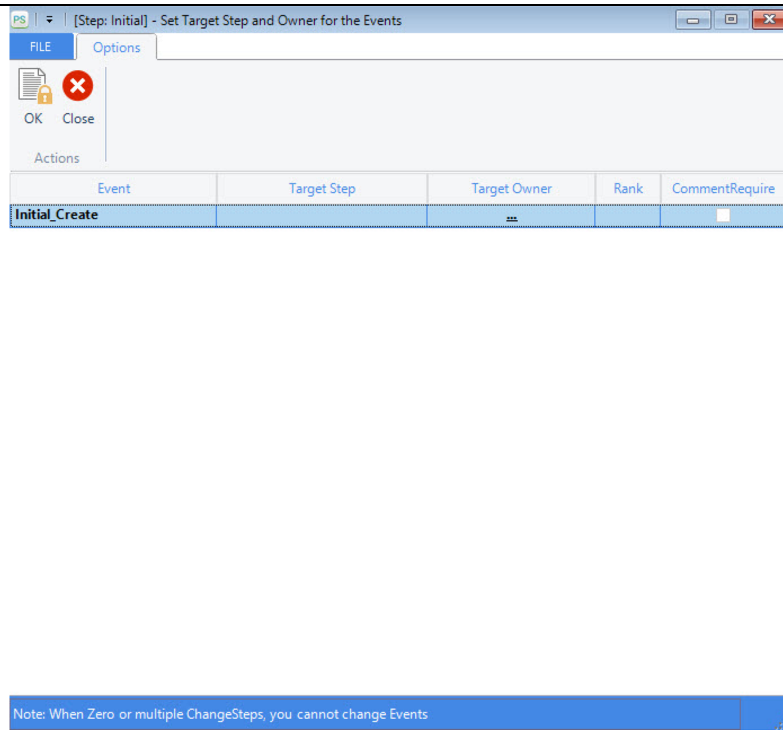
</td>
</tr>
<tr>
<td>PossibleOwners</td>
<td>This option will allow you to set the possible Workflow Users for the selected step. You need to click on Ellipsis’s icon to get directed to the Lookup Workflow Users screen. You can select the possible Workflow Users from the list and click on the OK button.

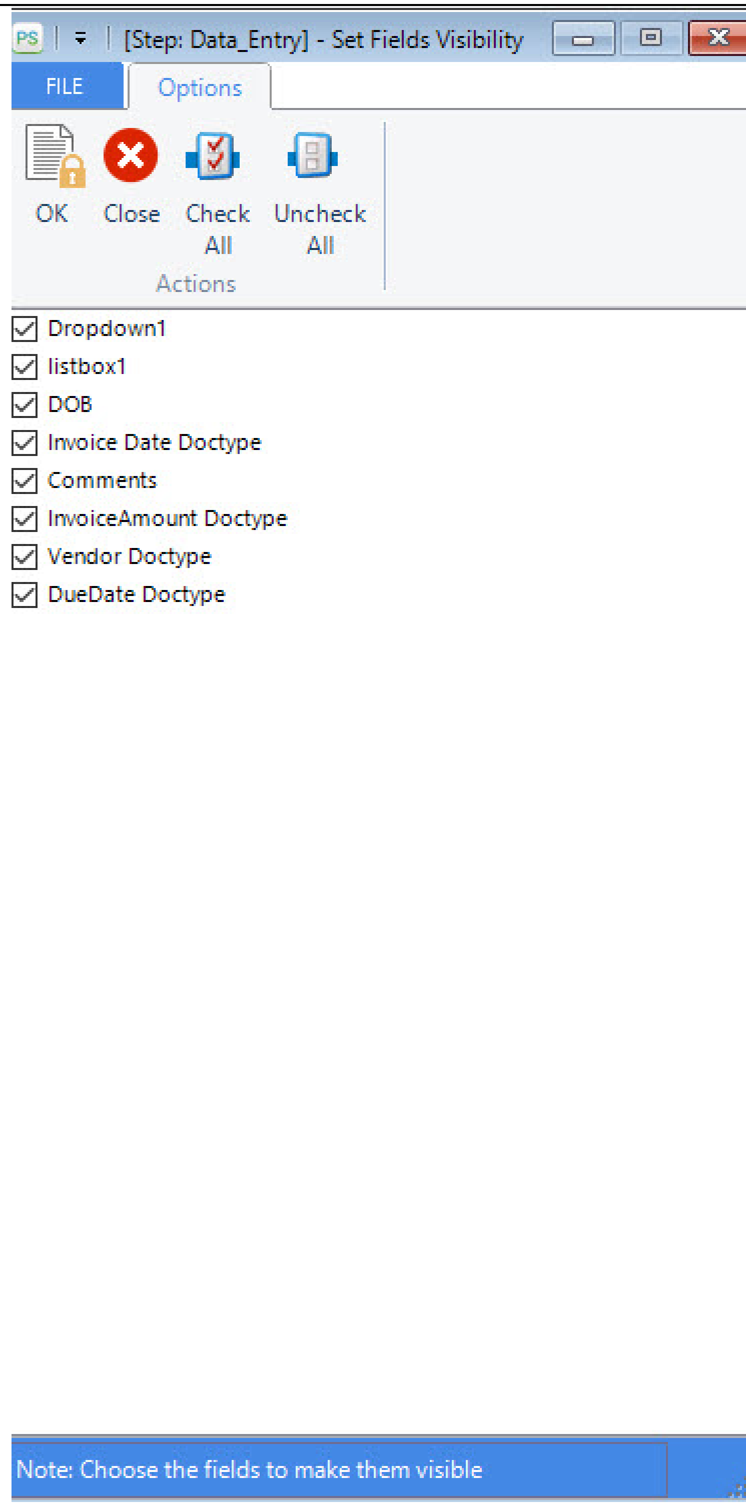


Note: The Workflow Users set under Possible Owners property could be the owner of the current step if you select the Specific List of Possible Owners option under the Ownership Style property.</td>
</tr>
</table>

PossibleOwnersFilteredbyTag	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 **Save & Close** button to save the formula and exit the window.  **Note:** 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 theOwnership Style property.
AllowOwnerChange	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). **Note:** 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.
BeforeAssociateScript	Click on the **Ellipsis** icon to write the script which will be executed before the associated event gets executed.

	 **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	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. **Note:** CommentRequired Property can also be set at Approve and Reject Event while designing a Workflow.
RequiresSignature	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.
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.
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 profile or global variables to specify the target step value.
TargetOwner	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. **Note:** 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. It is not mandatory to set TargetOwner at the parent step if the

	CanAssociateInThisStep property is set to True for the TargetStep.
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. **Note:** CommentRequired Property can also be set at Approve and Reject Event while designing a Workflow.

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.

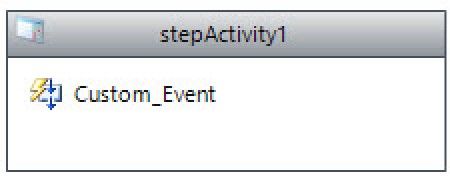
When you drag and drop the Event Driven Activity from the ToolBox section into the Workflow design area and on selecting the Event Driven Activity, you will be able to view the Properties section in the right panel of the screen.

Custom Event Activity

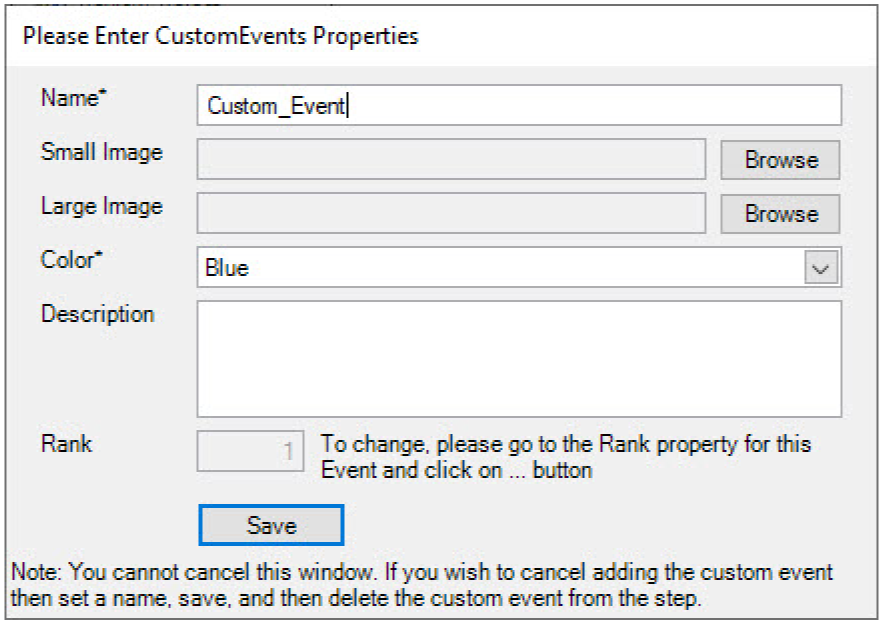
The name of the activity itself indicates CustomEventActivity that allows you to create a custom event as per your requirement. Using this activity can create a Custom Event by providing "PostScript" and "PreScript" where you can specify the JavaScript which can be used to perform the operation on the 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.

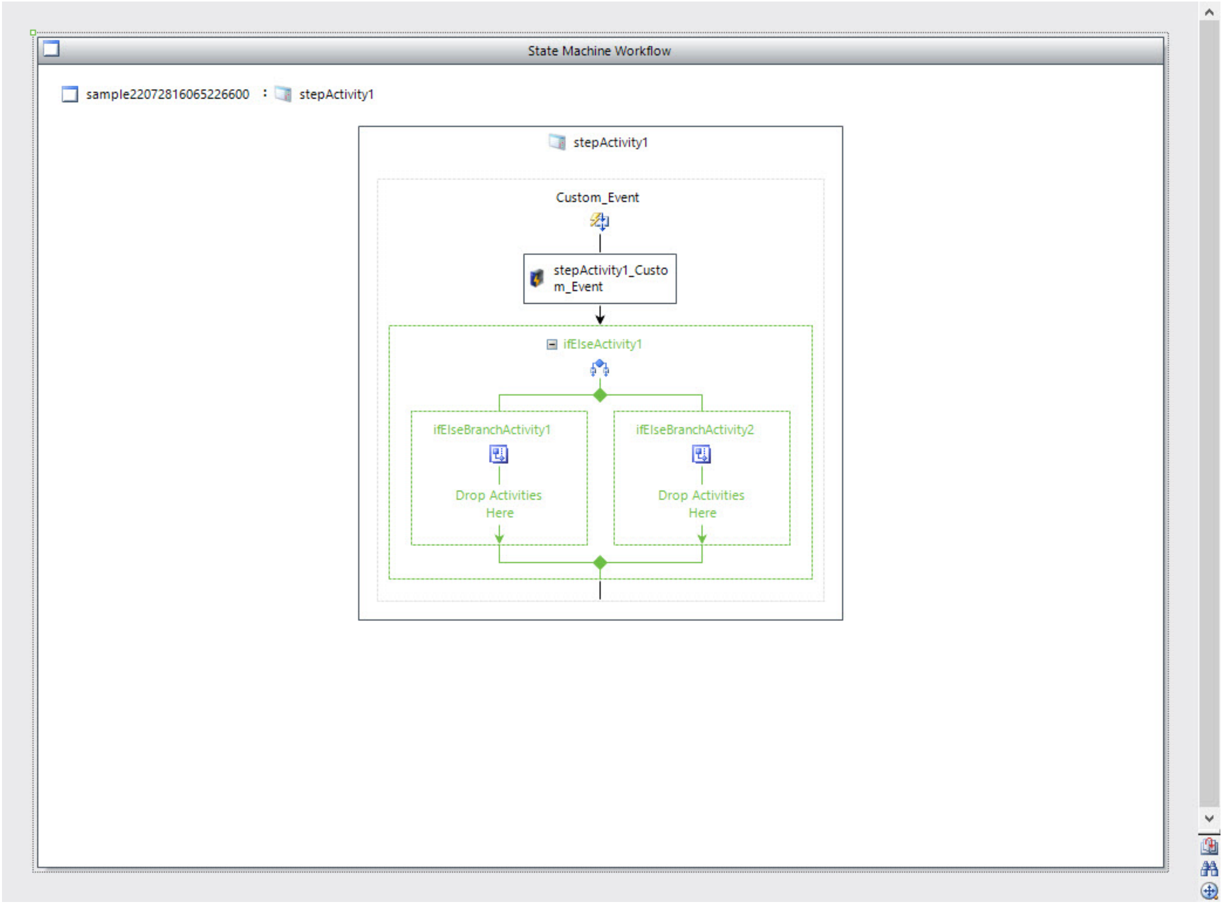


3) Enter the following details:

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 **Ellipsis** 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 **Ellipsis** icon.
SmallImageName	You can click on the **Ellipsis** 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.

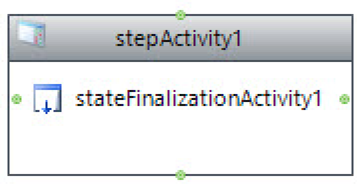
When you drag and drop the State Initialization Activity from the ToolBox section into the State Activity and on selecting the Activity, you will be able to view the Properties section in the right panel of the screen. The properties are as follows:

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.



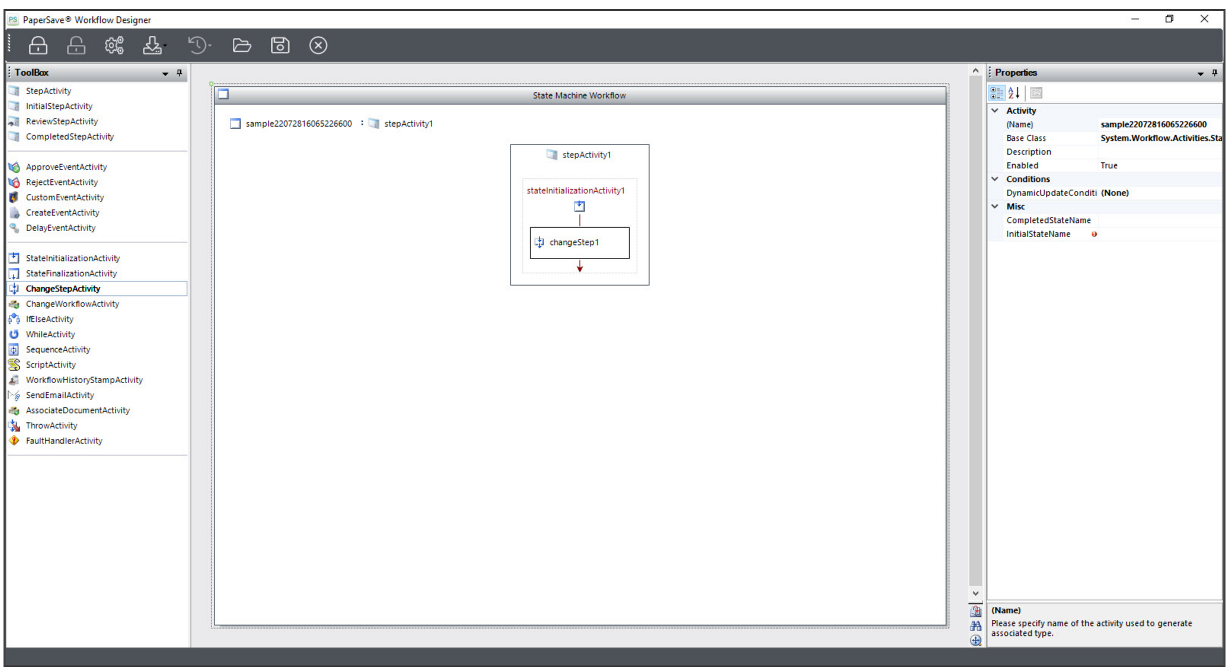
When you drag and drop the State Finalization Activity from the ToolBox section into the State Activity and on selecting the Activity, you will be able to view the Properties section in the right panel of the screen. The properties are as follows:

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

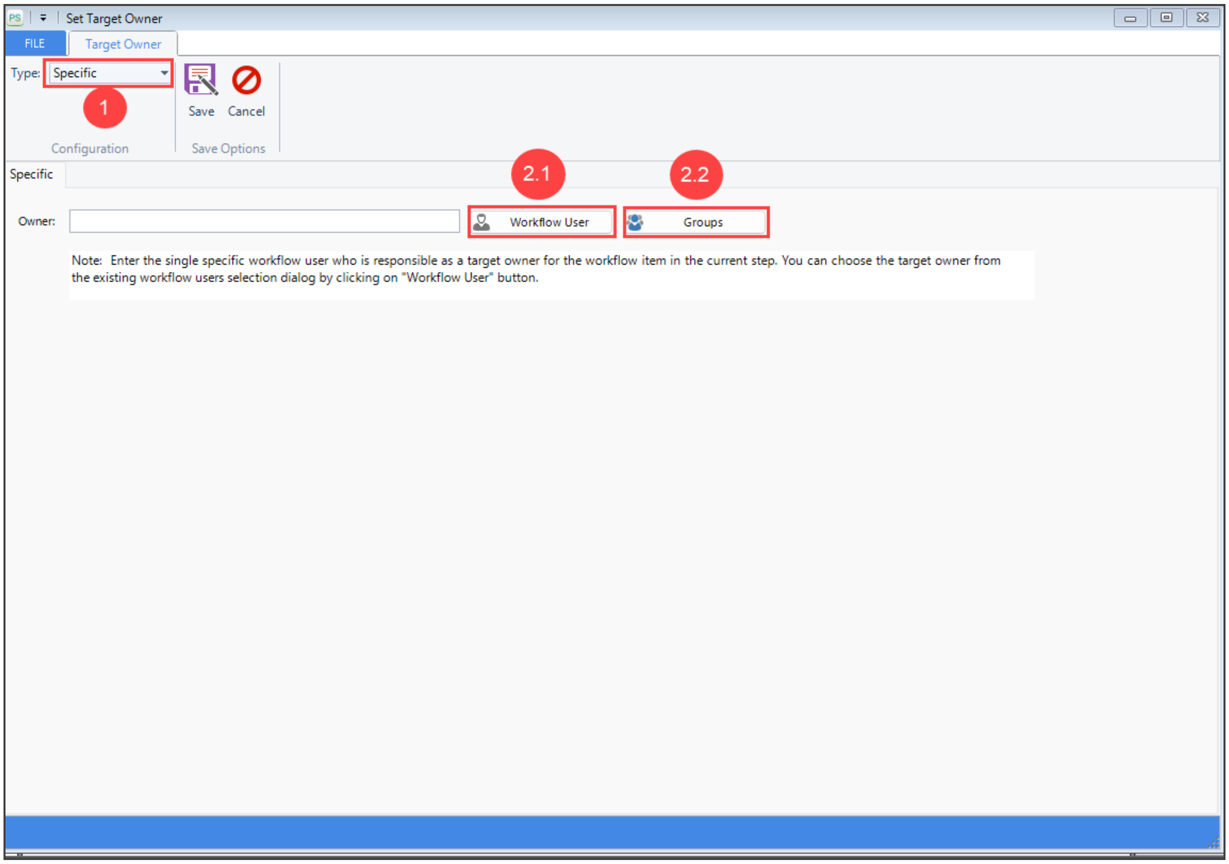
3) AutoEntryActivityForStep

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.

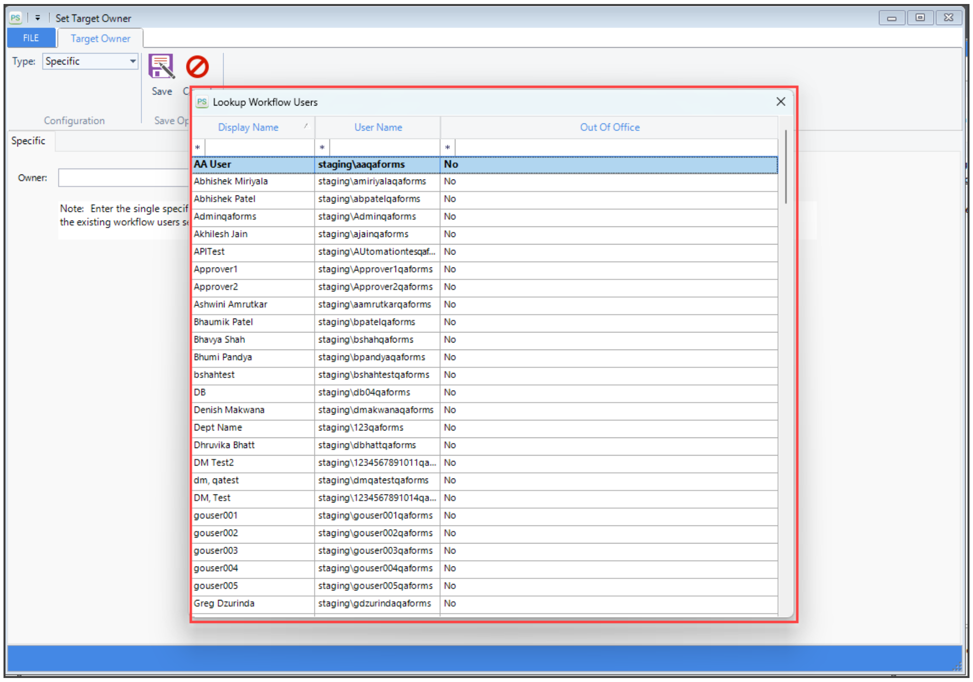
1) Type: Select the type of Target Owner as Specific from the drop-down list.

2) Once the Type is selected, you can choose either a Workflow User or Groups to set as the target owner.

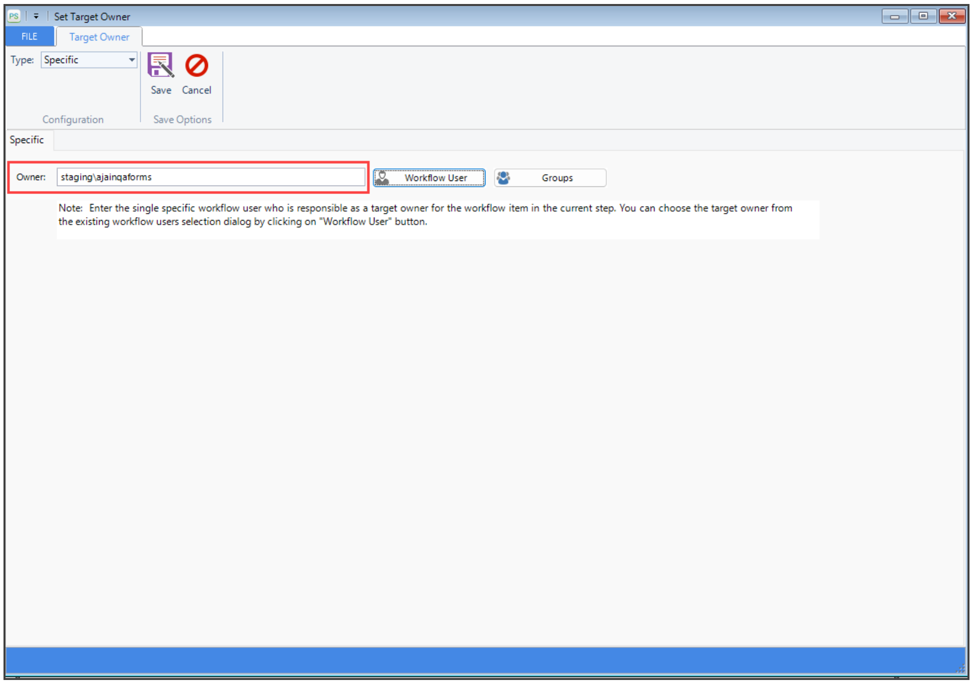


2.1) Workflow User: Select Workflow User, if you want to set the single user as a target owner.

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.

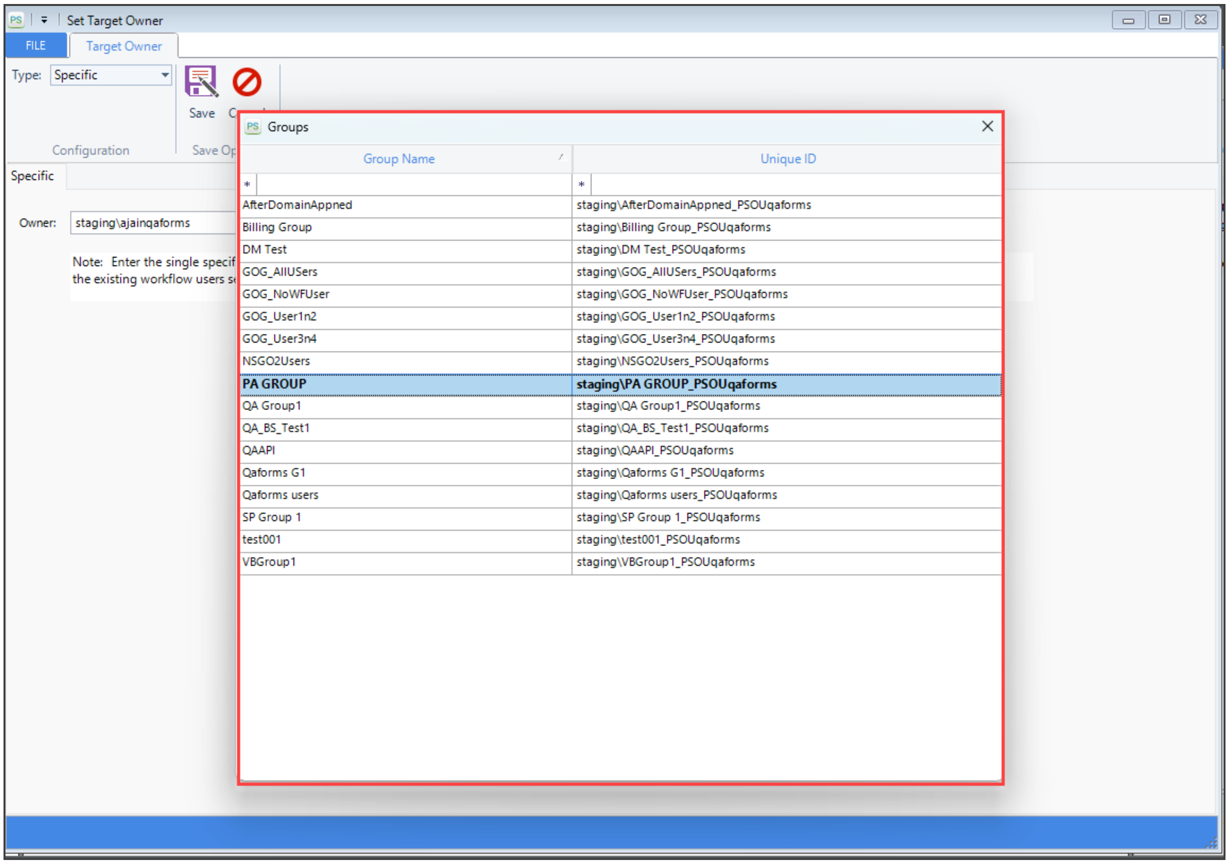


2.1.2) Owner: You can view the selected User from the Lookup which gets displayed in the available textbox.

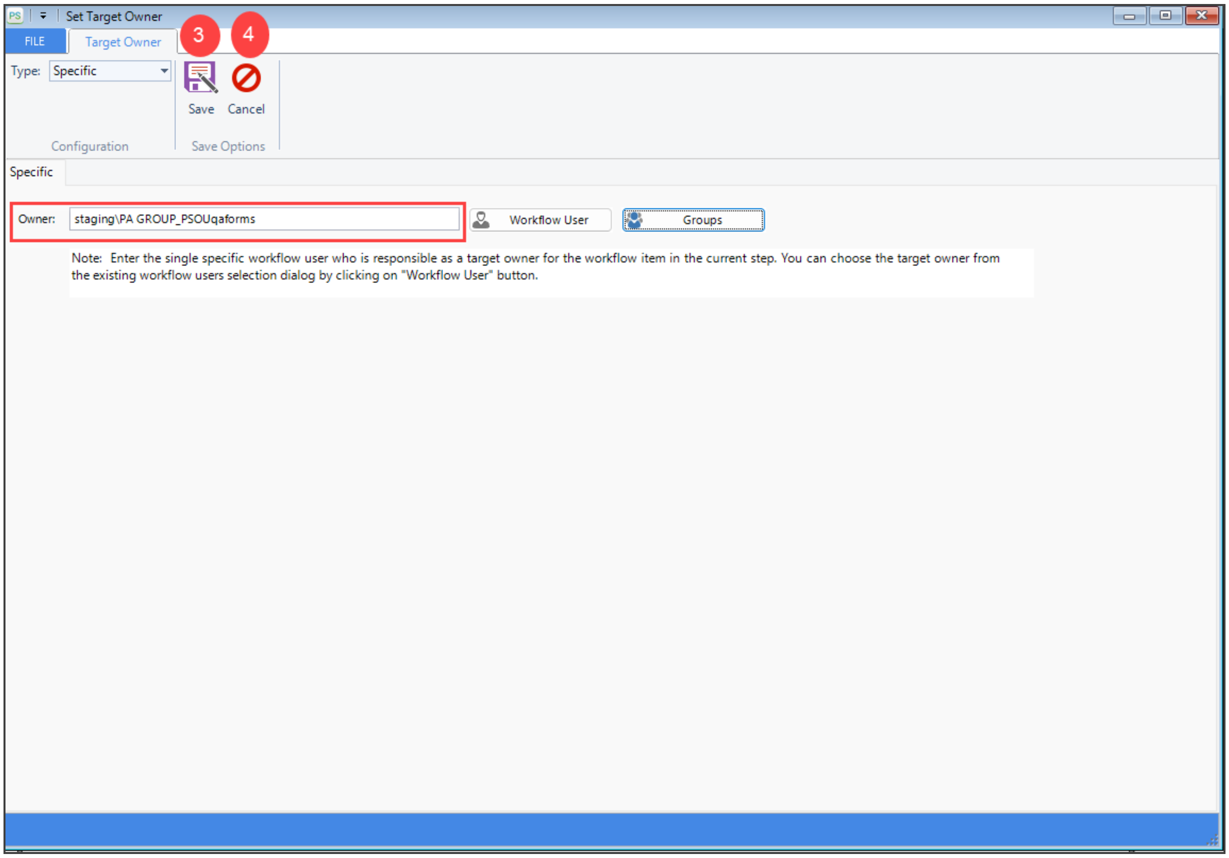


2.2) Groups: Select Groups, if you want to set the group as a target owner.

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.

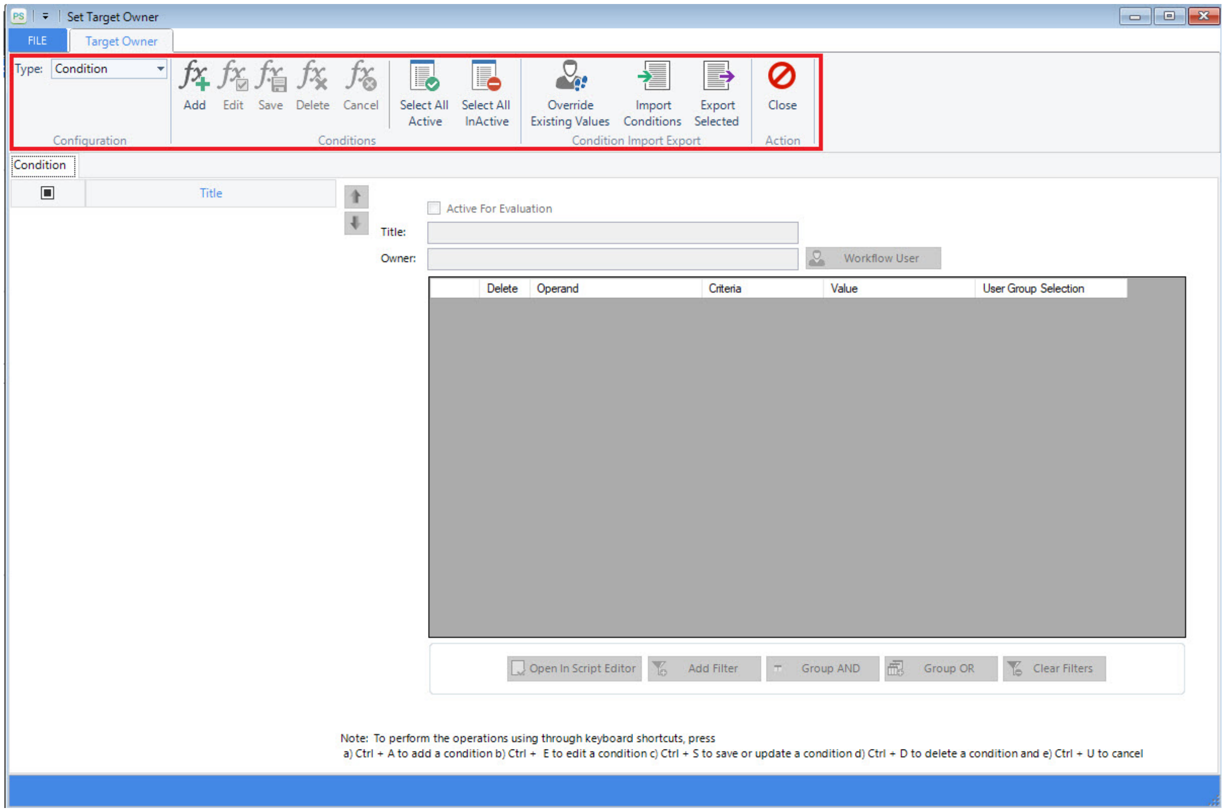
Override Existing Values: You can click on Override Existing Values to override the existing condition while importing a file.

> **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.

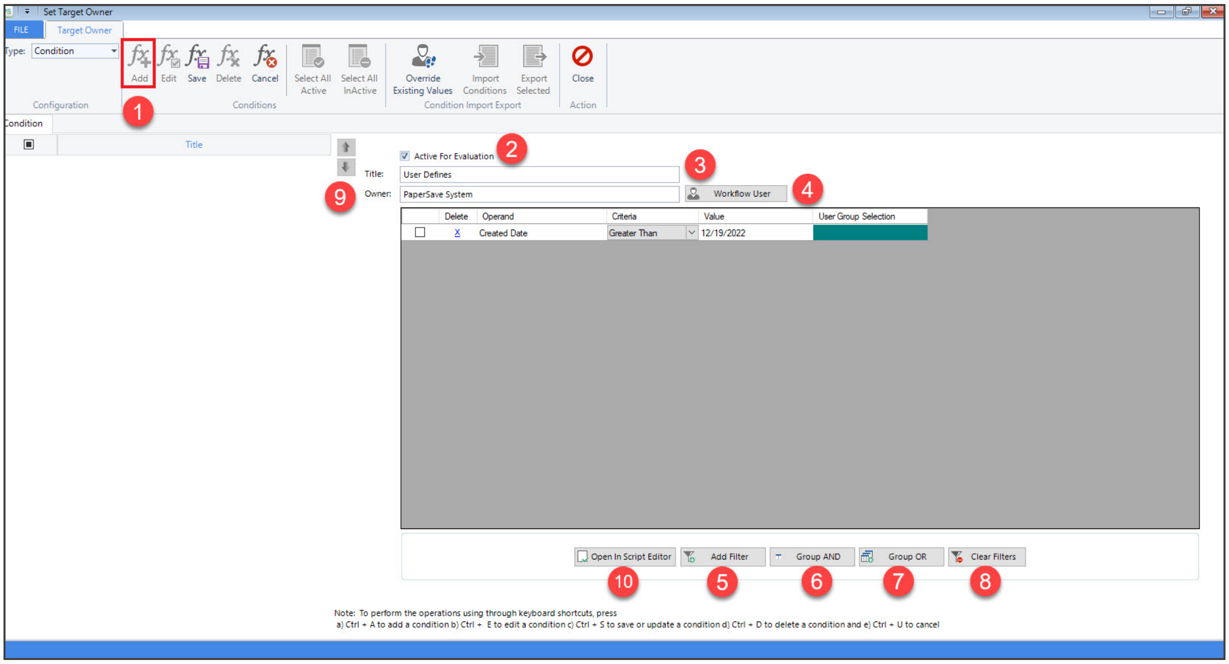
7) **Group OR**: Group OR option will group the selected condition into OR. You are also allowed to group a bunch of grouped conditions into one group by selecting them using the Ctrl key as displayed in the below screen.

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.

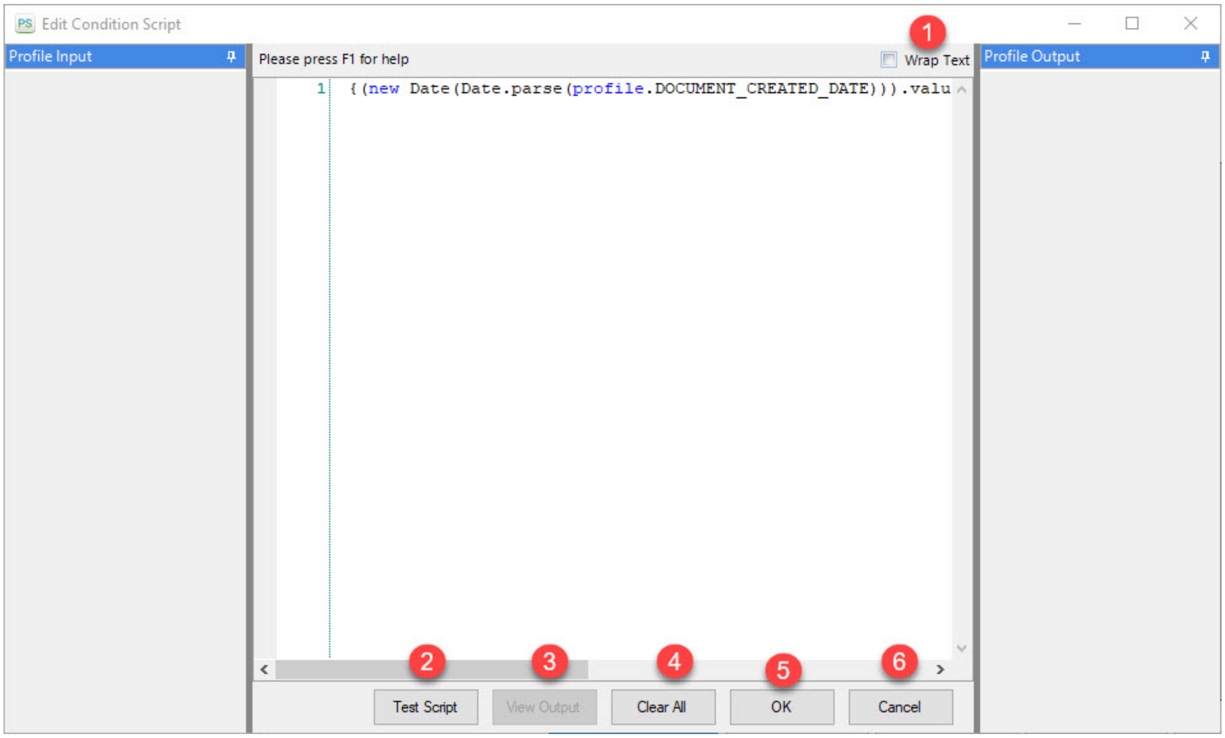
2) **Test Script**: To test the script, click on the **Test Script** option.

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.

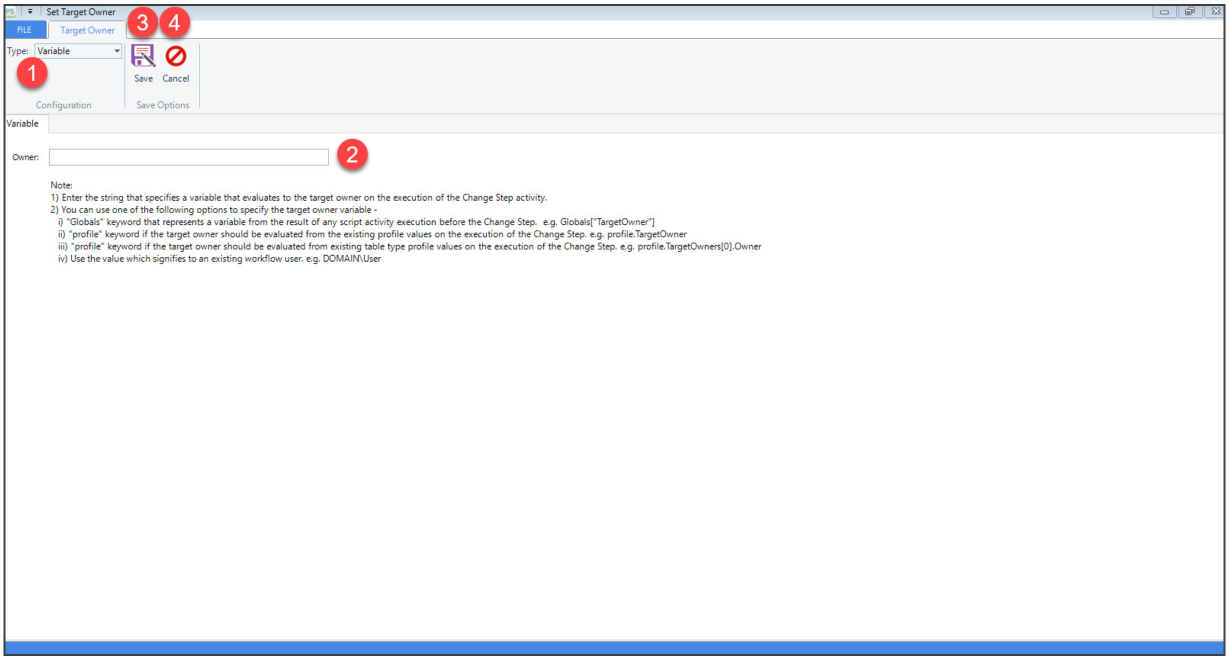
2) **Owner**: Here you can either enter the string that specifies a variable or use the Globals or Profile keyword in the available textbox. The variable will be evaluated at the time of execution of the activity and the value of variable will be used as a target owner.

> **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.



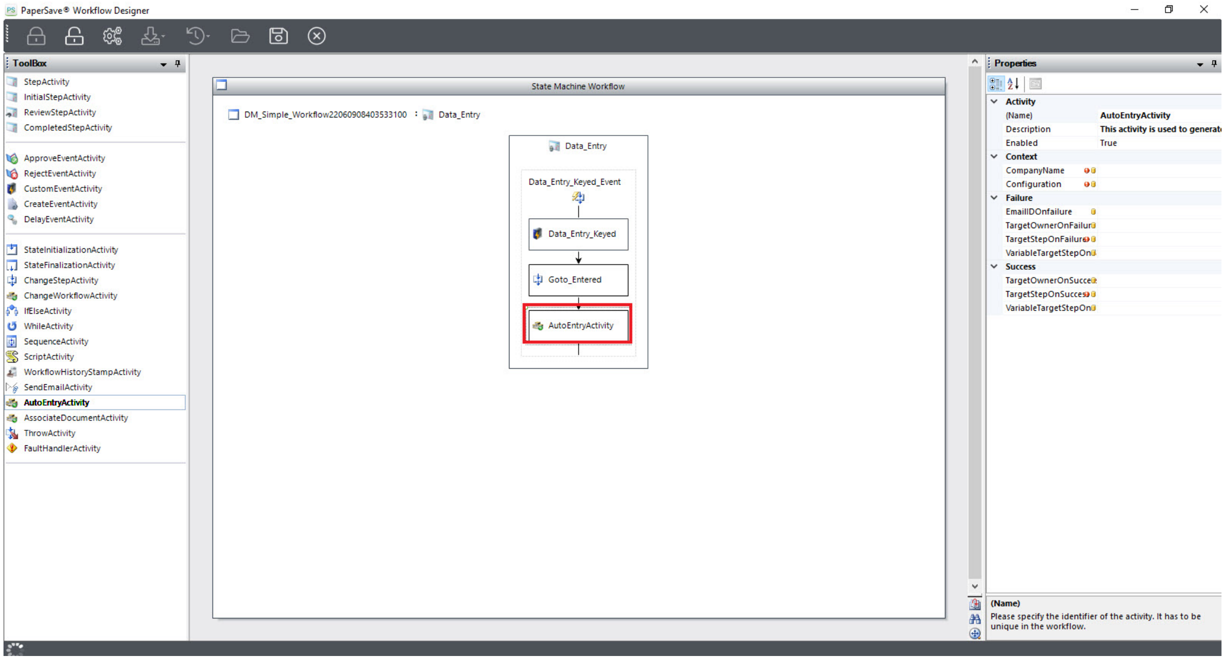
Auto Entry Activity

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:

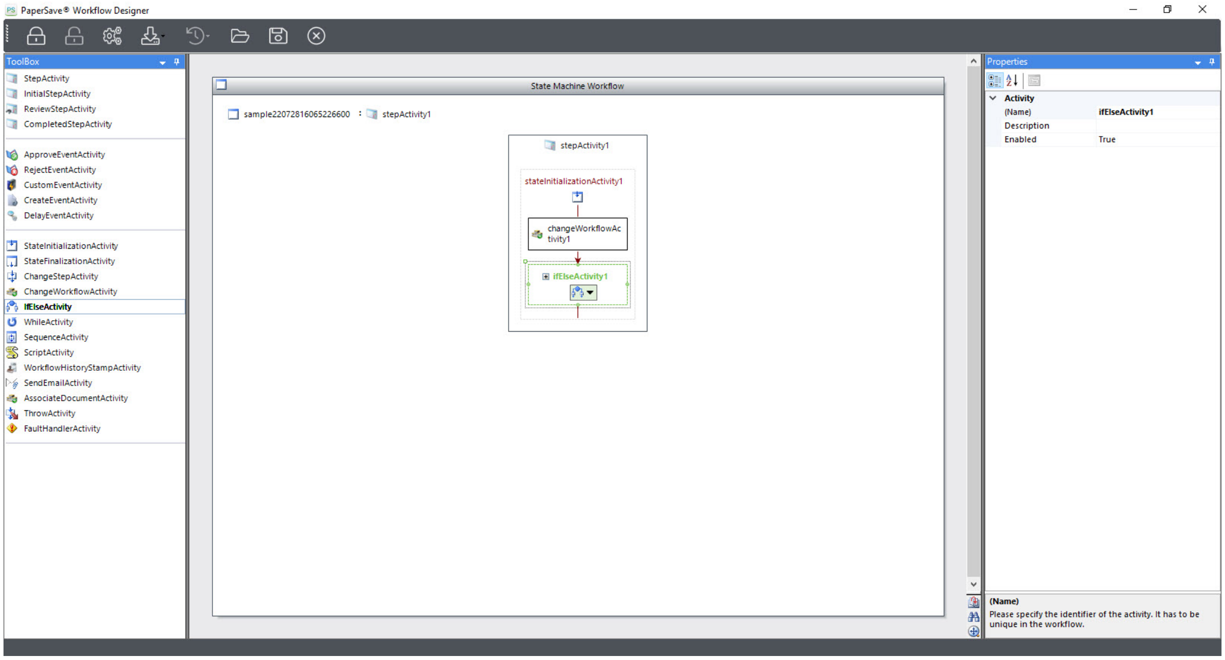
Success:

- **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:

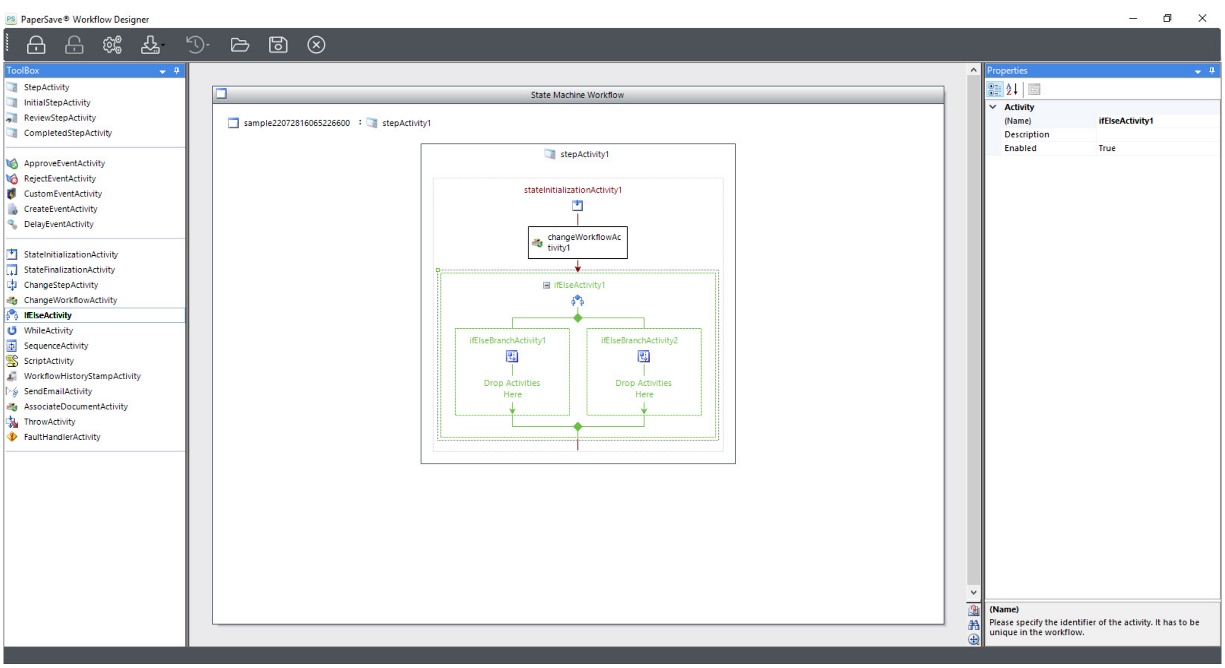
If Else Activity

To write an IF/Else condition, follow the steps below:

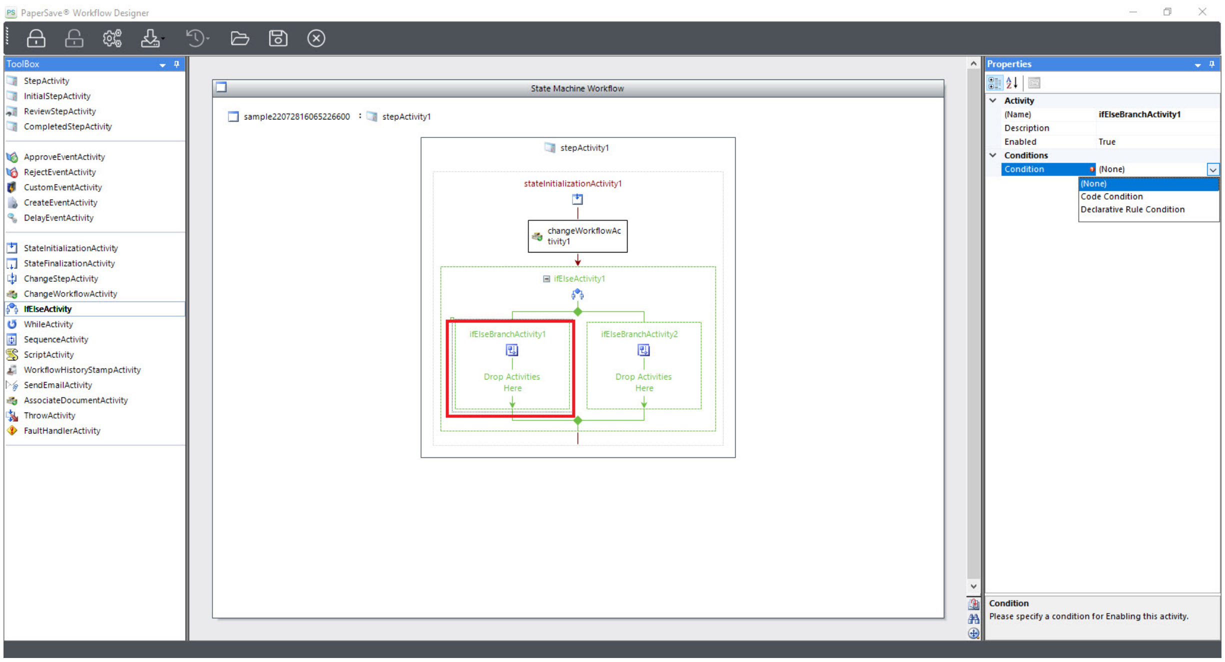
1) Drag the IfElseActivity from the toolbox and place it under an event after which you want to have an IF/Else condition, as shown below:



2) Click on ifElseActivity1 and provide the Name, Description, and value for Enabled from the Properties window.

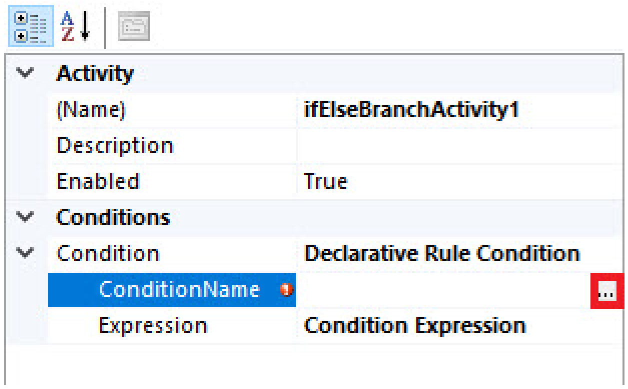


3) Click on the left of the "IfElse" branch activity as shown below by an arrow and select "Declarative Rule Condition" or "Code Condition" for the Condition Field under the Properties window.



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:

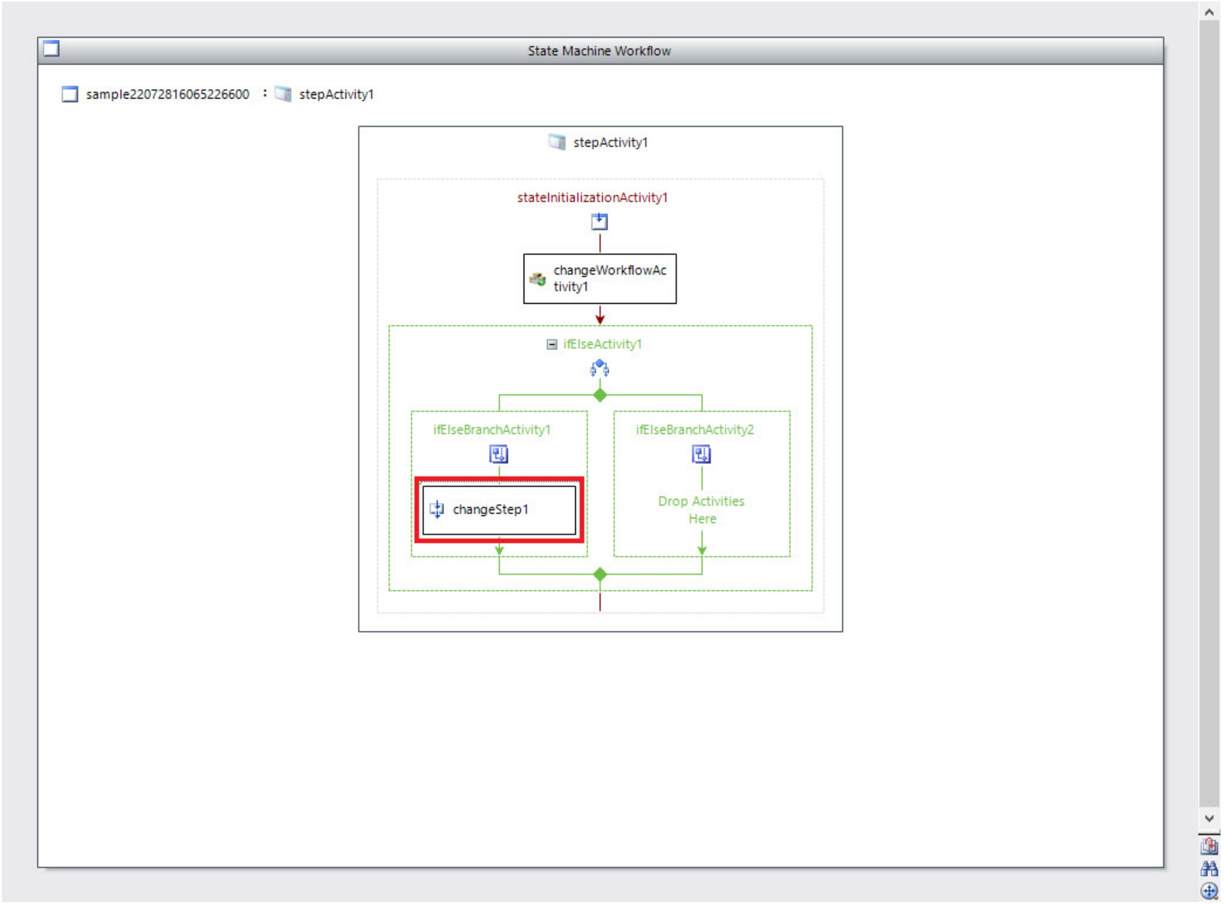


5) The Select Condition dialog box will open. Click on the **New** option.

6)The Rule Condition Editor dialog box will open, type in the Condition and click on the **OK** button.

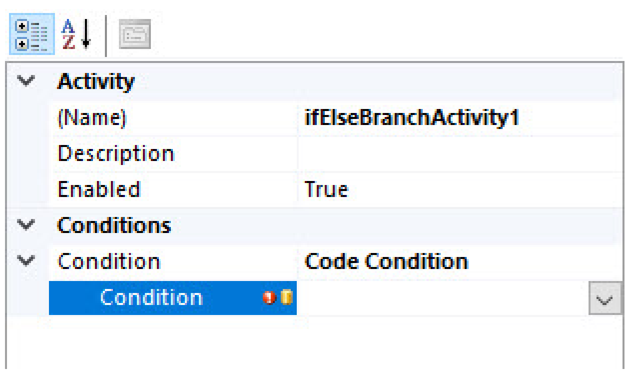
> **Note:** The word that is highlighted in the above image in the "Rule Condition Editor" can be a Profile Field of the current Document Type or it can be a PaperSave Variable.

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.



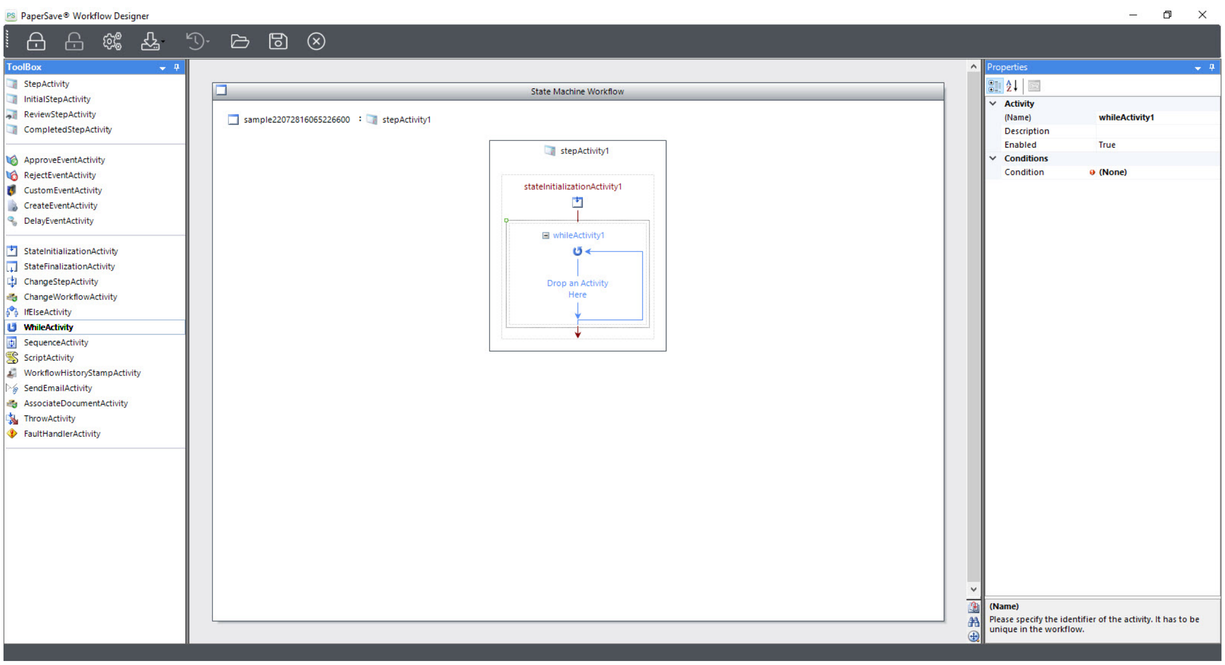
You can also use the profile fields by using the following syntax:

profile.profilefieldname

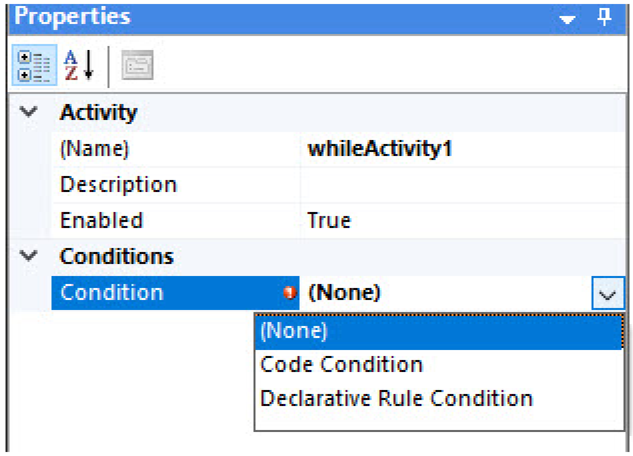
While Activity

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:

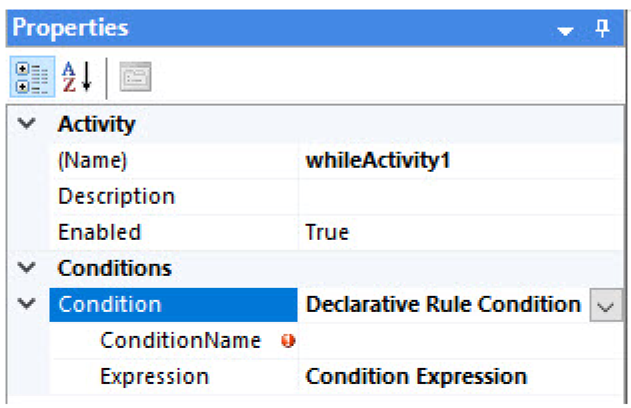


2) Click on WhileActivity and you can view the Properties section in the right panel of the screen, as displayed below. You can define a condition using two ways; Code Condition and Declarative Rule Condition.

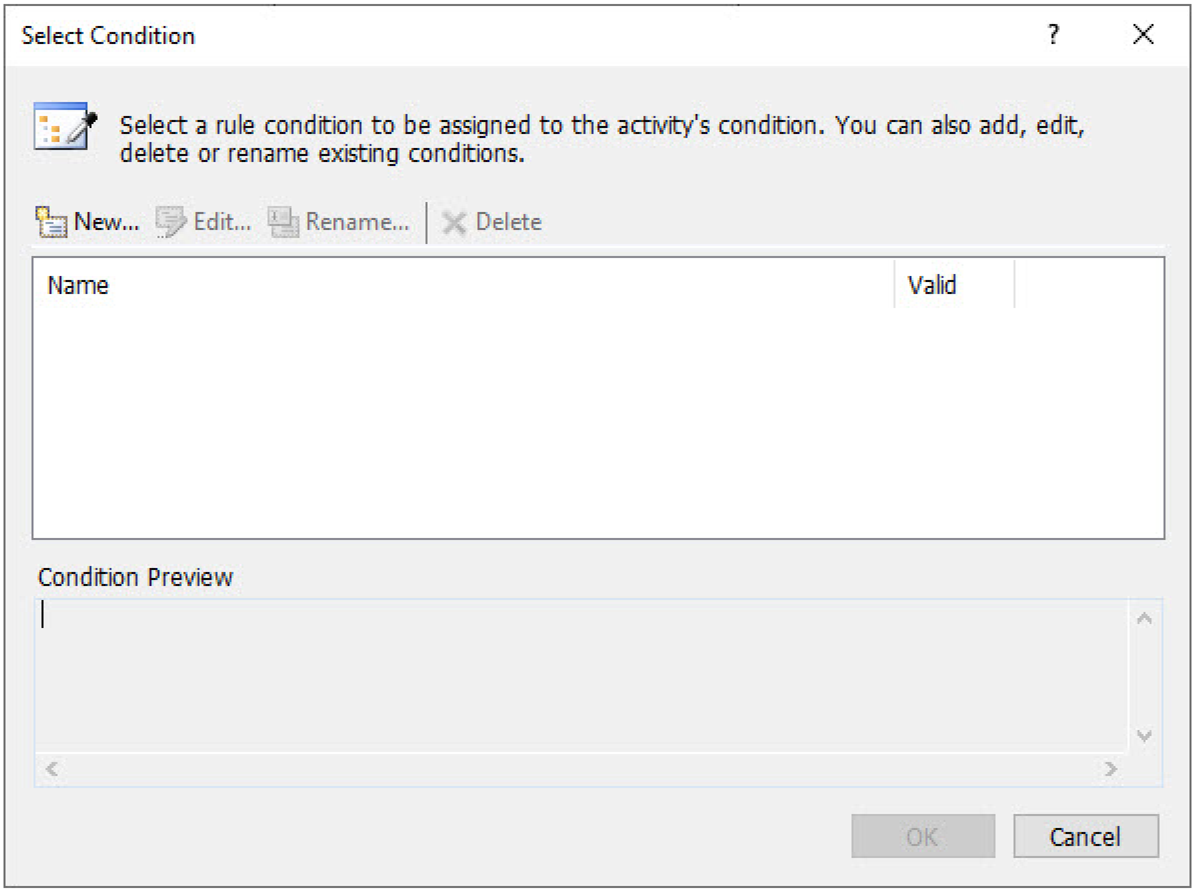


Declarative Rule Condition:

3) Select Declarative Rule Condition and expand the Condition tree, as displayed below. Give the Condition Name in the available textbox.



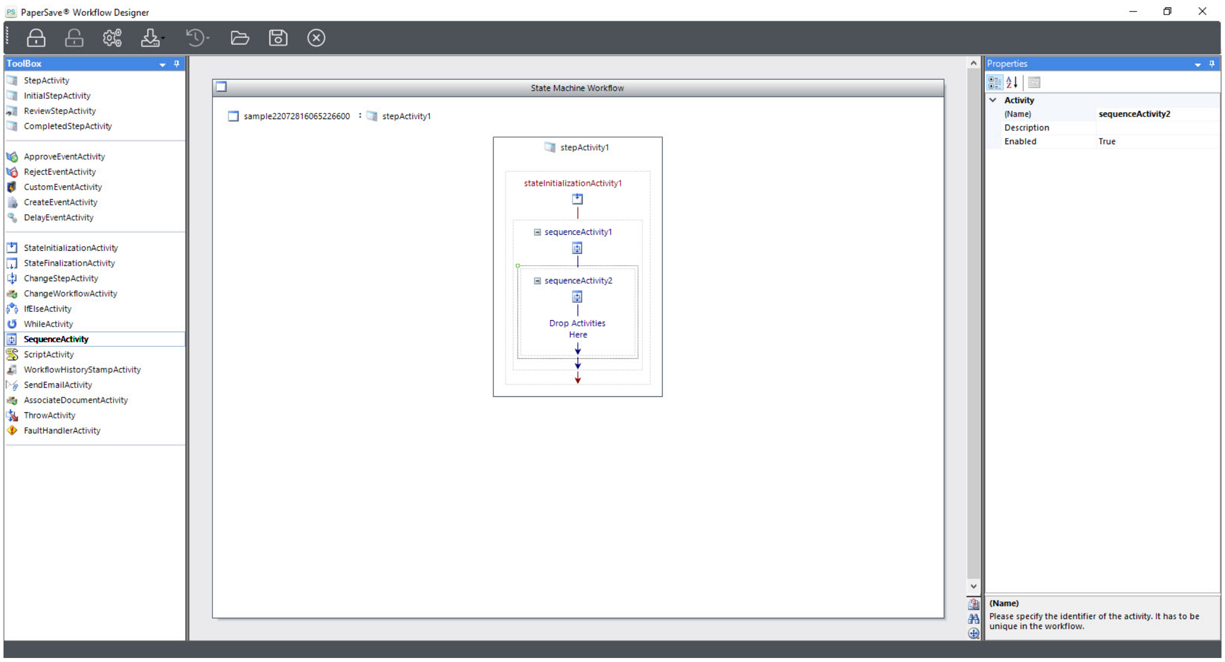
4) Click on the **Ellipsis** icon for Expression, to define the Condition. Select Condition screen appears, as below. You can define the condition as required and click on the **OK** button to save the condition.



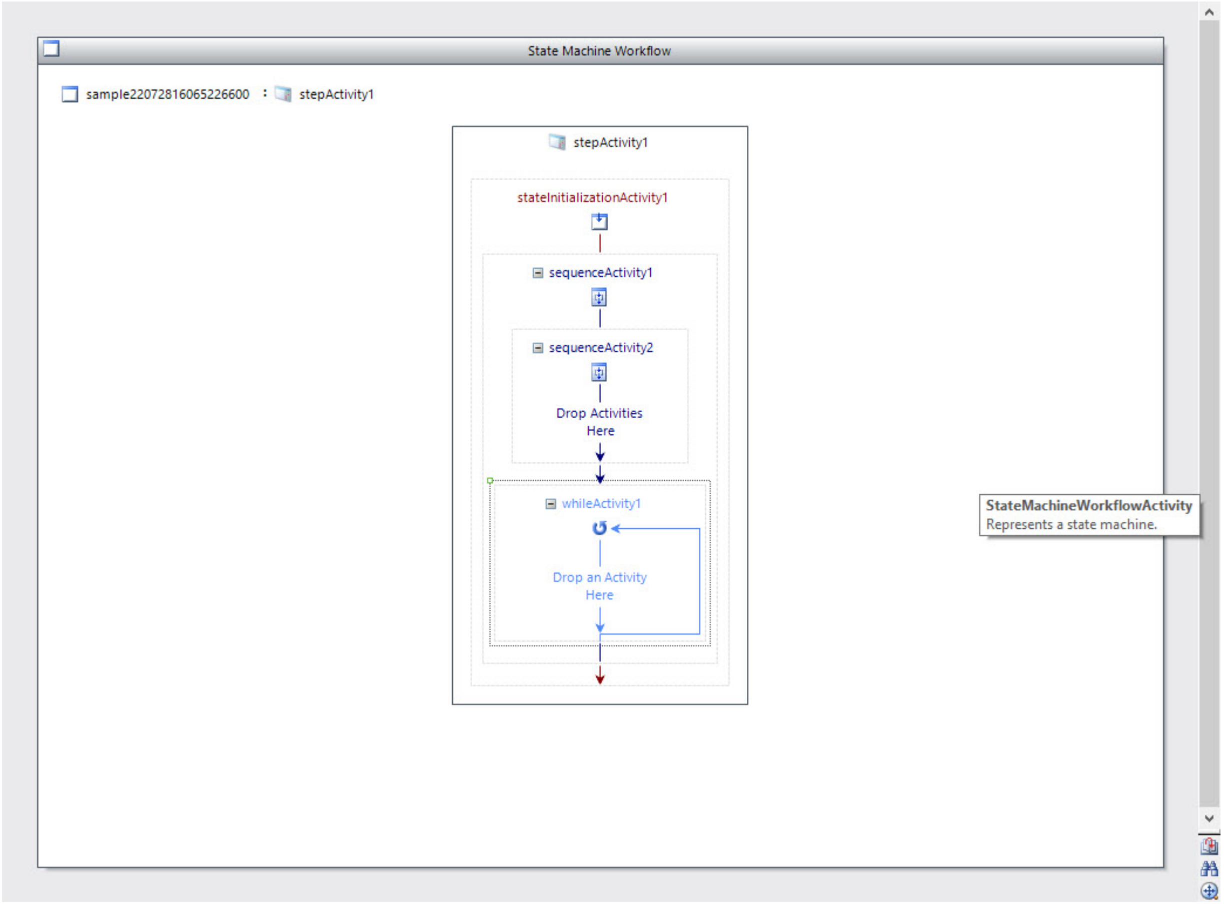
Sequence Activity

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:

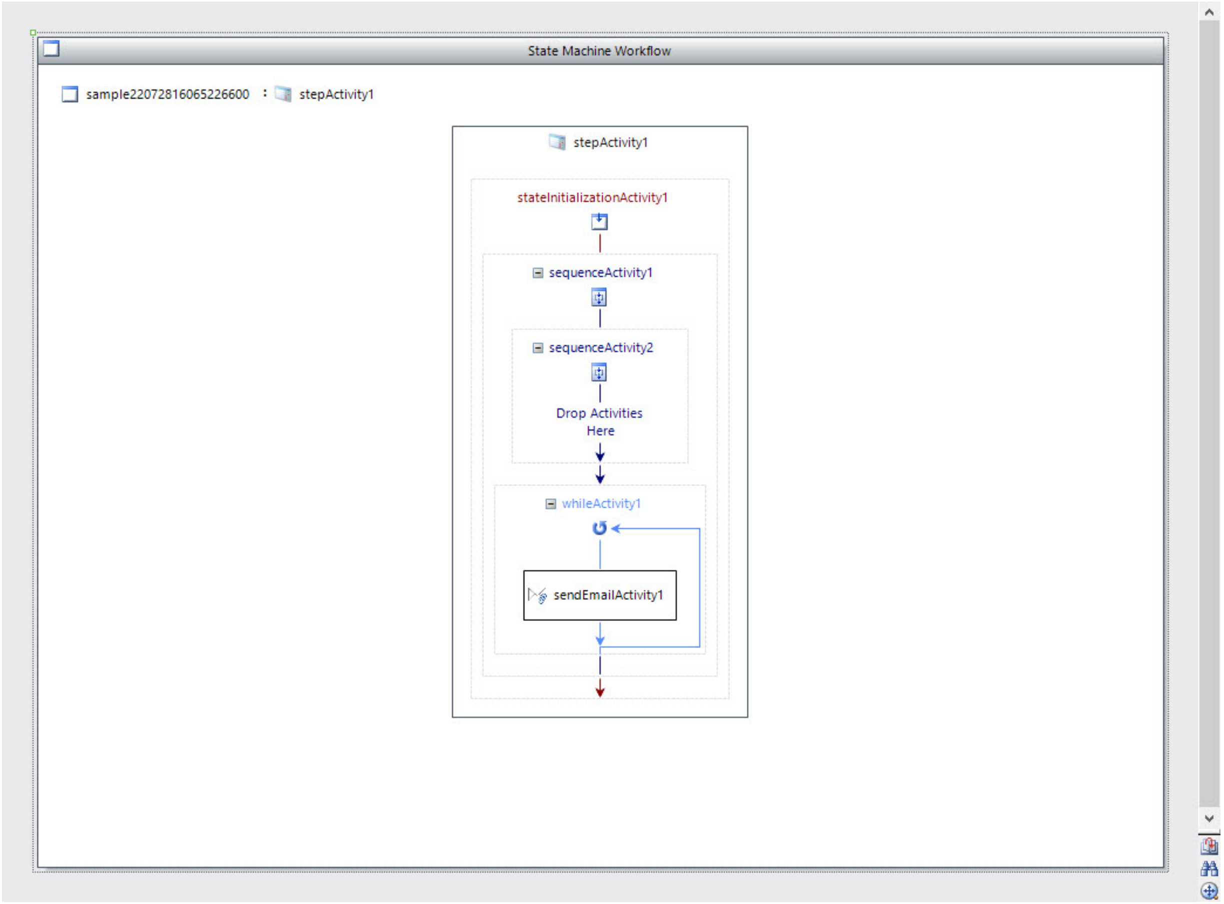


2) Now, drag and drop WhileActivity within SequenceActivity as displayed below:



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.

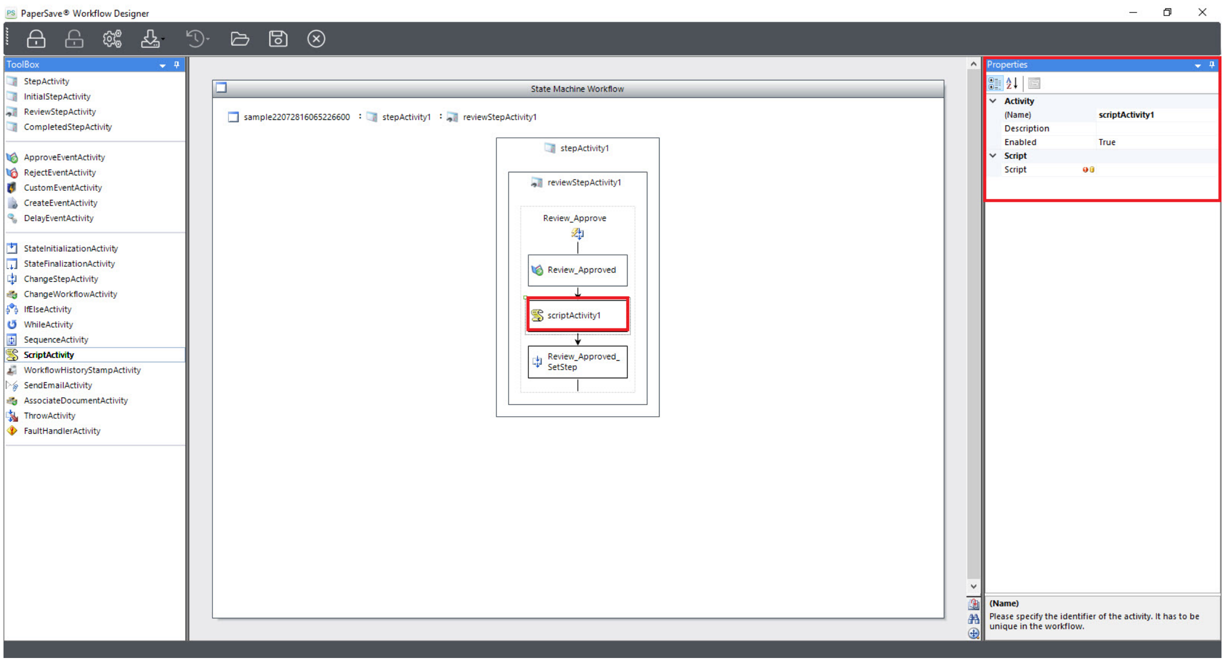
You can write the condition for WhileActivity in the manner in which you would like the events to be executed.



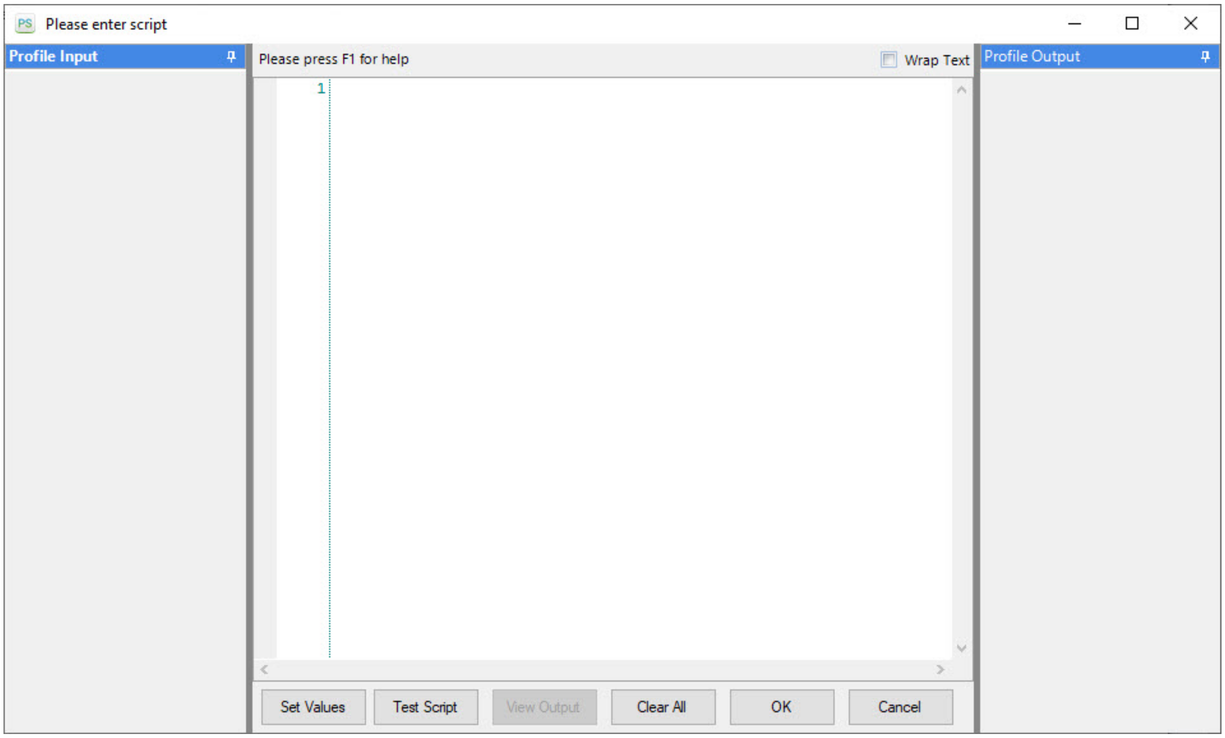
Script Activity

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

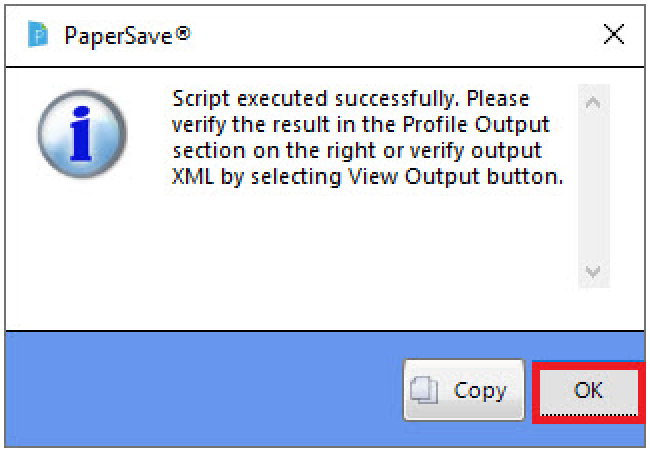
PaperSave 5.2 gives you the ability to generate custom error messages by writing a script in the script editor window in below-given format:

throw new Error("<message text>")

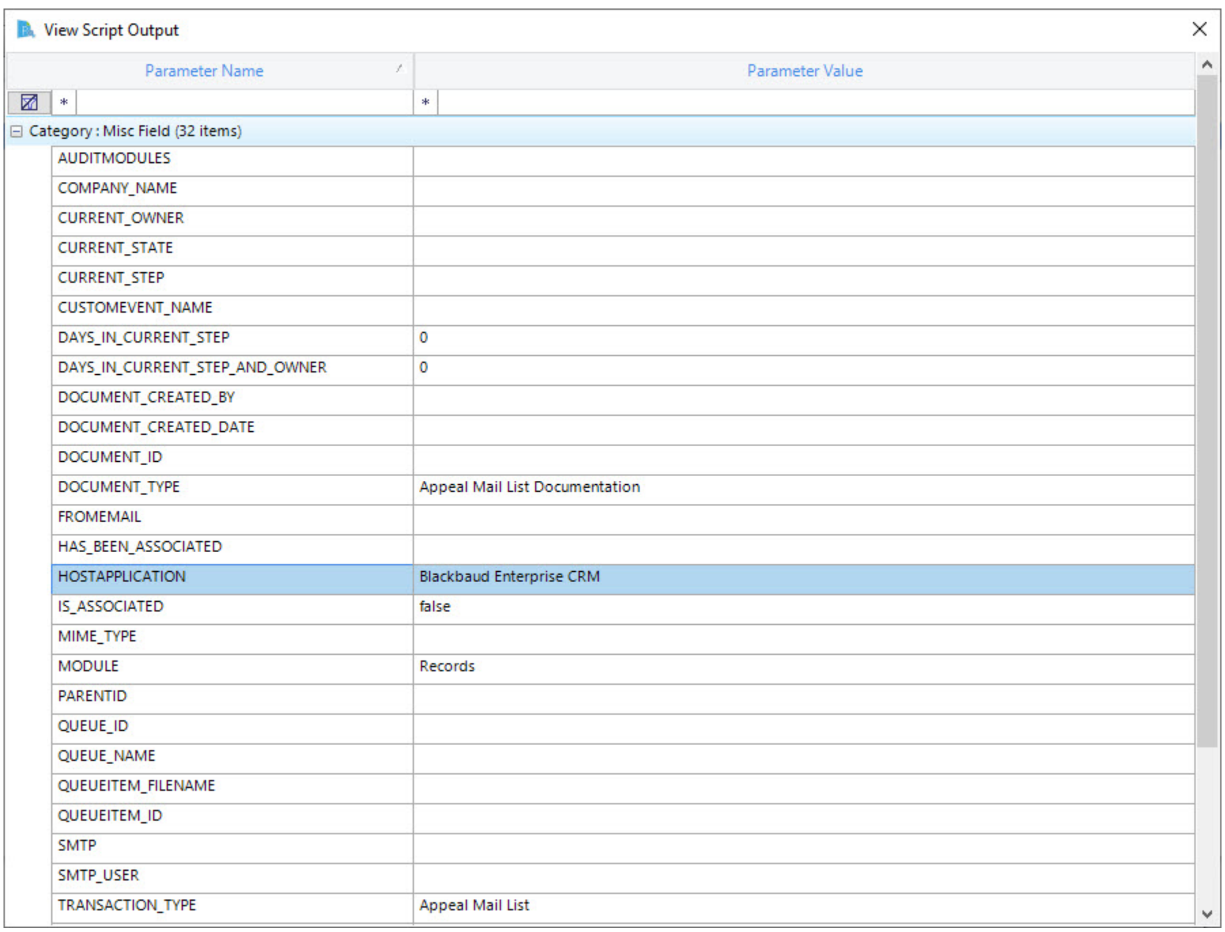
You can write the script as given in below example:

```
try{
if(<condition if true>)
throw new Error(<"My Exception Message">);
}
catch(e)
{
throw (e.message);
}
```

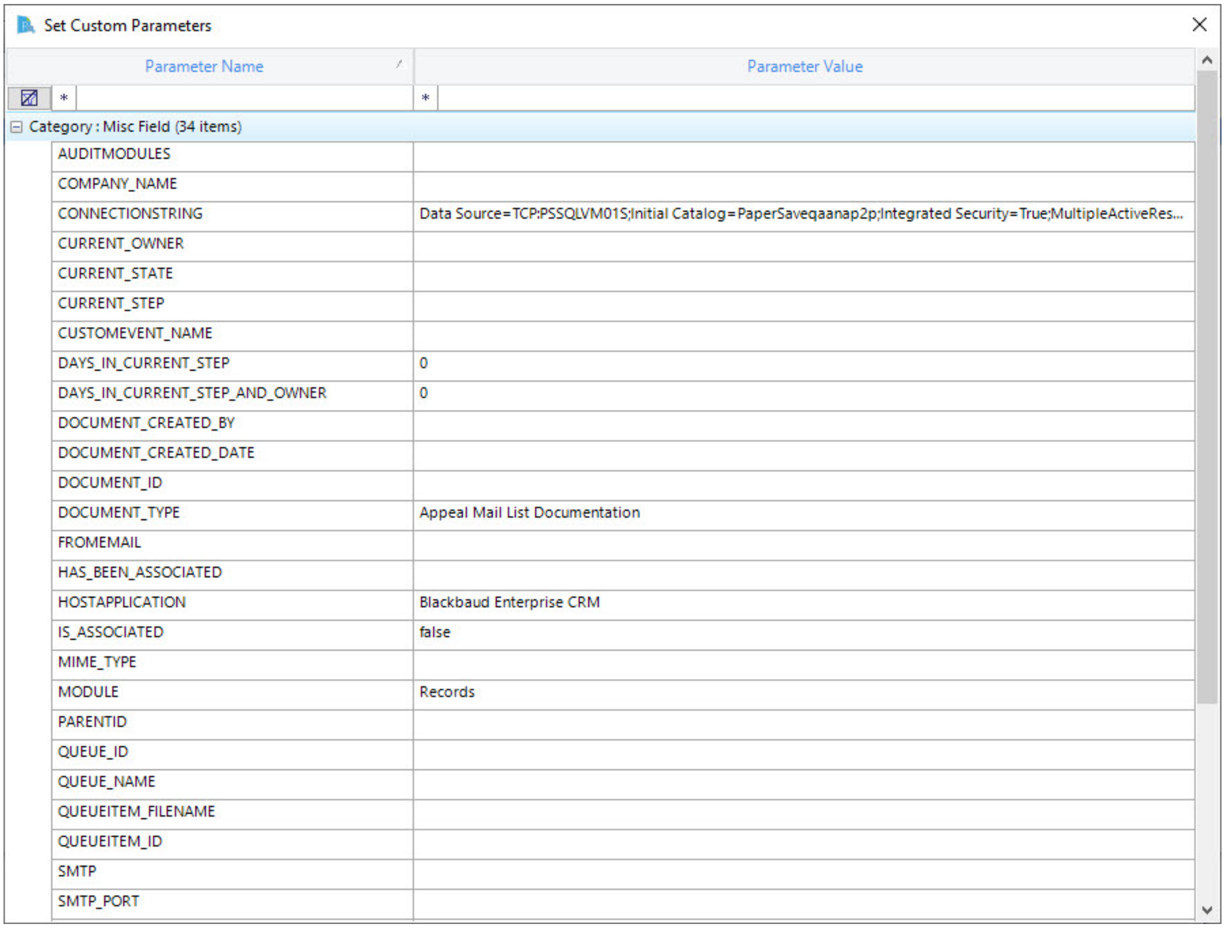
5) Once you have written the script in the Script Editor window, click on **Test Script** to evaluate the script. If the script will get successfully executed then you will be able to view below-displayed message. Click on the **OK** button to exit the screen.



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.



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.



7) Provide the appropriate values for the desired settings and click **Close**.

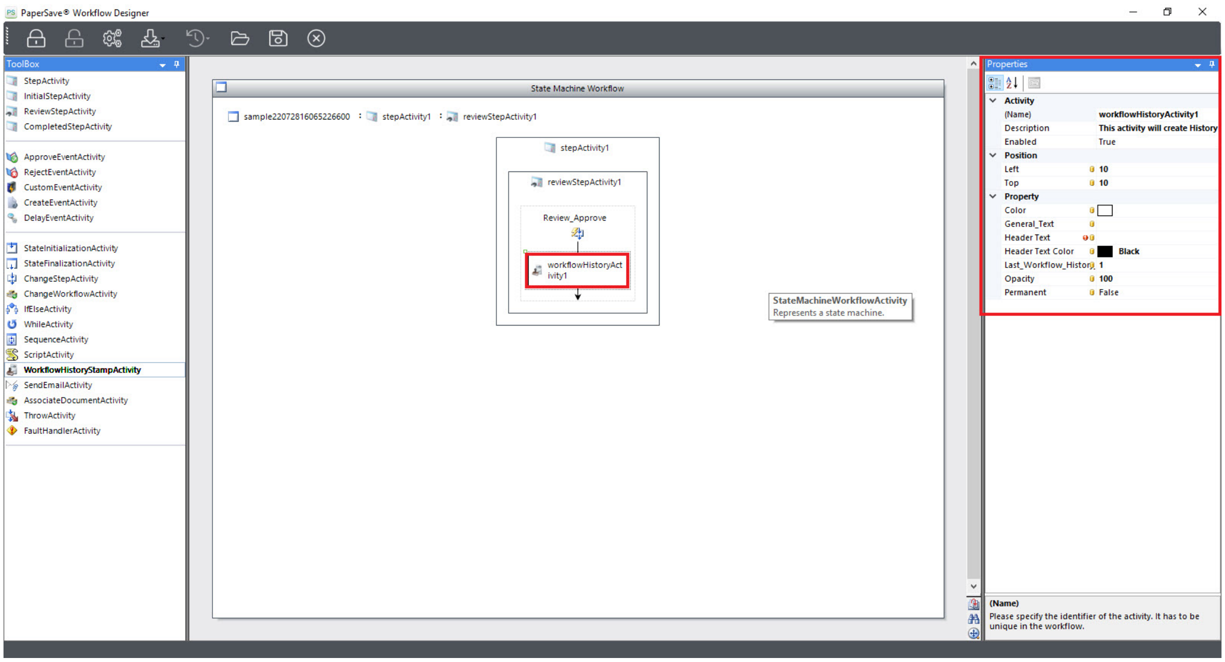
Workflow History Stamp Activity

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. **Note:** 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

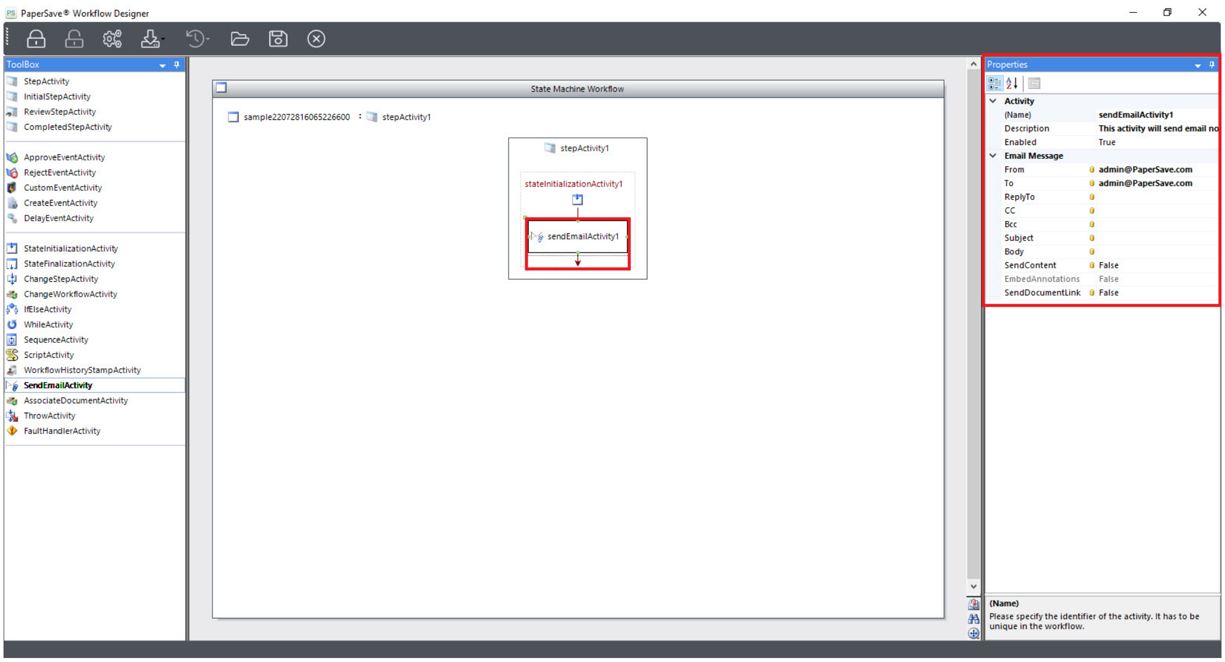
	and column header.
General_Text	This text will be displayed with annotations. You can use the Workflow Designer to set values. Also, you can use Profile[“”], Globals[“”], and Parameters[“”] to make dynamic values on a Stamp annotation.
Header Text	Enter the text that you want to set for the workflow 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. **Note:** You are allowed to add multiple email addresses under the "To", "CC" and "BCC" textboxes separated by a semicolon (;).

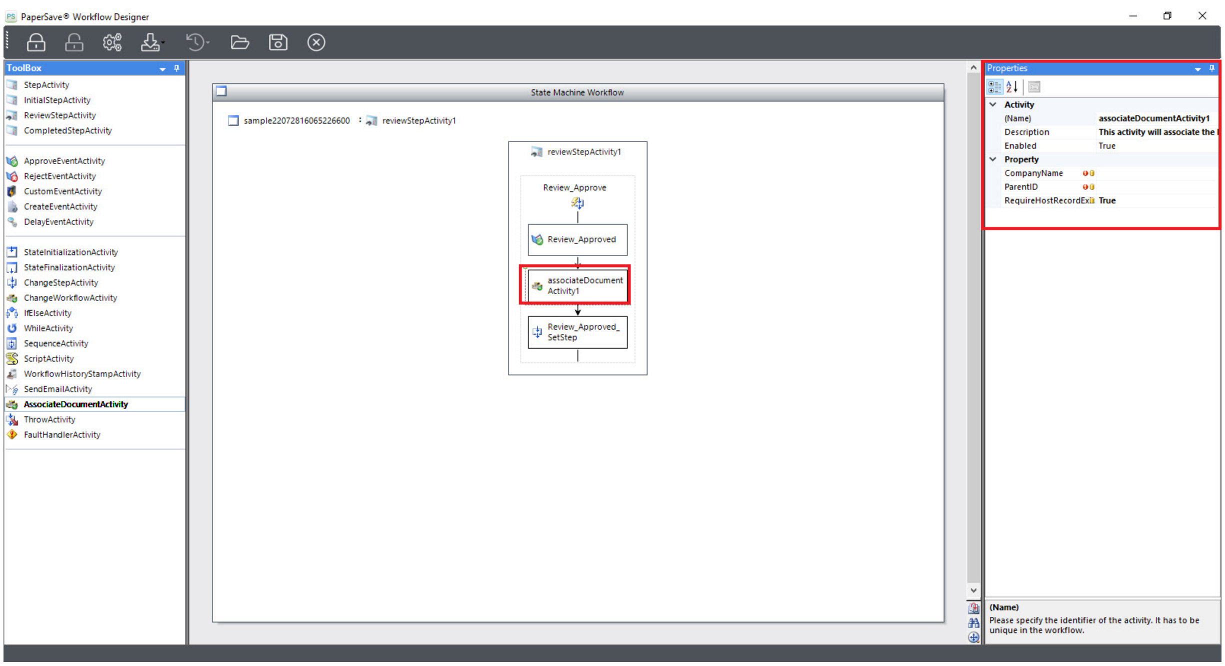
Associate Document Activity

This activity allows you to associate a document with a host record for the selected Company and ParentID.

Note: If AssociateDocumentActivity exits 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 **Ellipsis** icon and select the Company Name with which you want to associate the document with the completion of the activity.
ParentID	Click on the **Ellipsis** icon and select the ParentID (Unique ID) with which you want to associate the document on completion of the activ-

	ity. **Note:** 1) CompanyName and ParentID are mandatory fields to be set for this property. 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.
RequireHostRecordExistence	• 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. • 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.

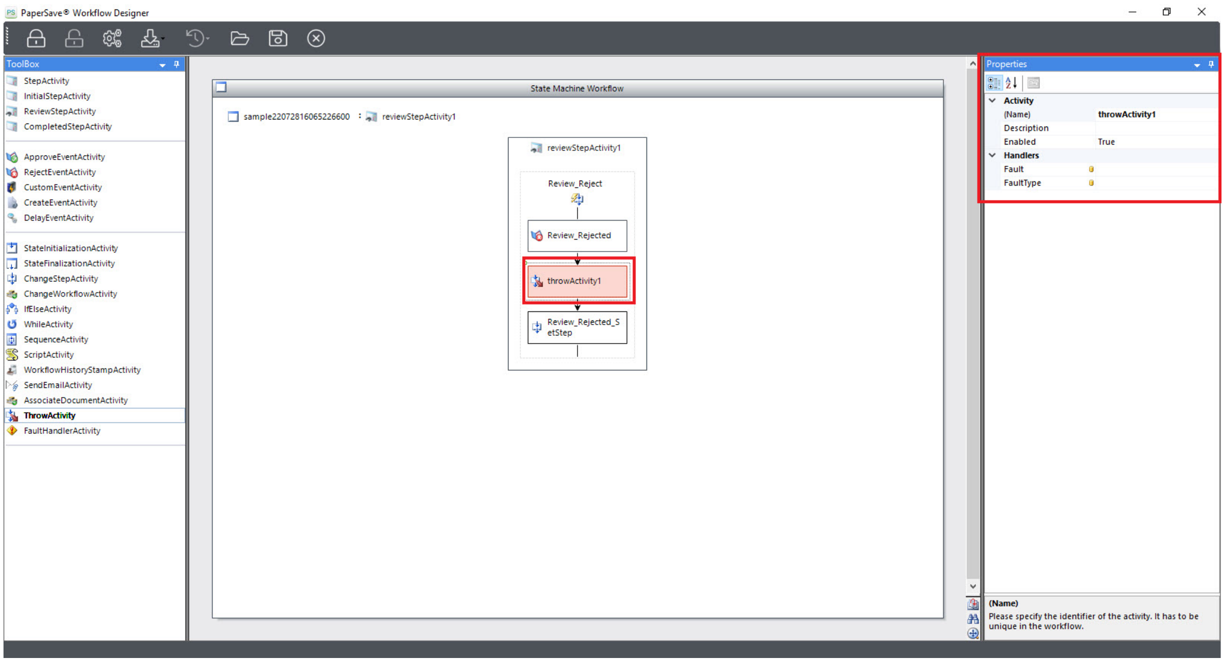
Throw Activity

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

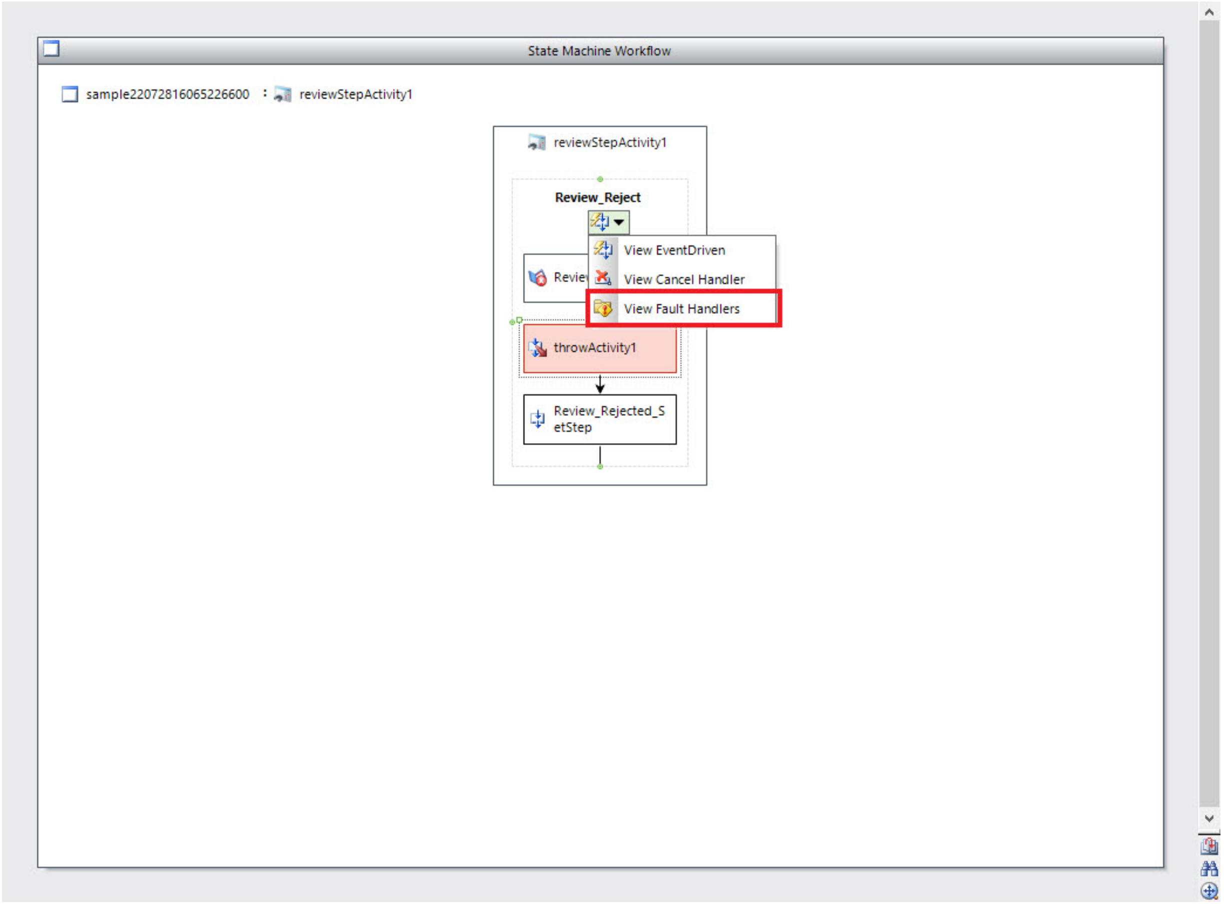
Fault handling in Windows Workflow Foundation refers to the handling of exceptions in an asynchronous manner. This means that exceptions that are thrown in an activity (explicitly or implicitly) are caught by the workflow runtime engine and then scheduled in a queue to be handled at a later time. This 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

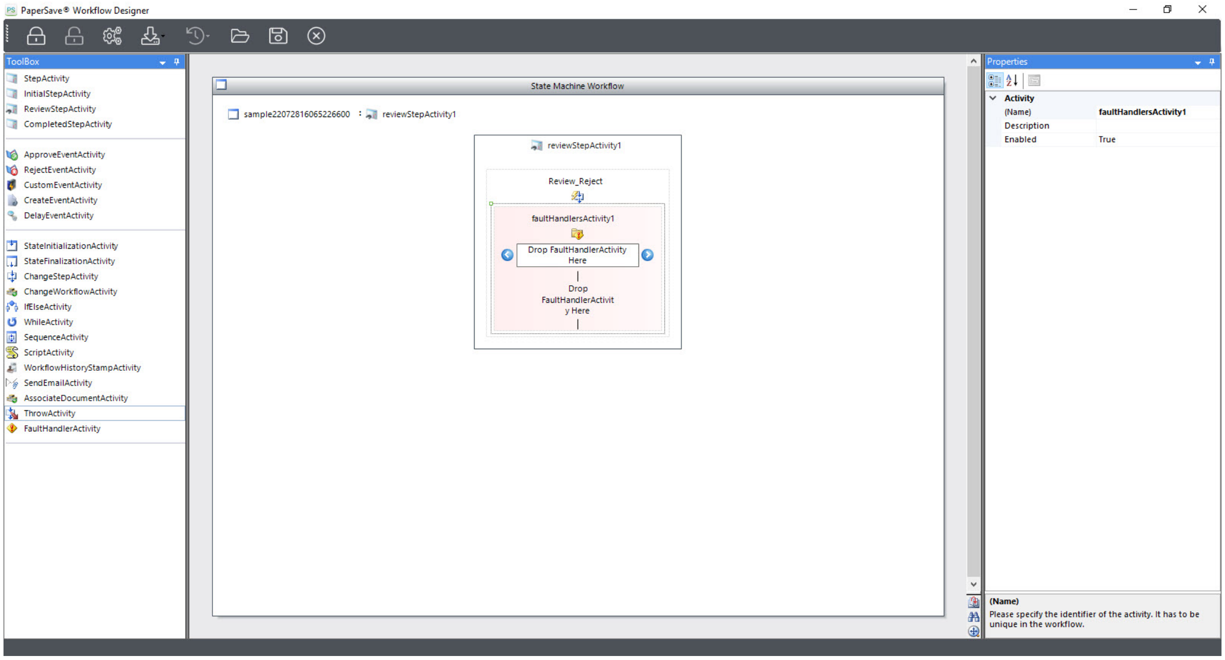
There are two ways you can handle exceptions in a workflow. The first is to use a try-catch block in your code. The try-catch block enables you to handle exceptions in the code that caused the exception. You can then write additional code to take an action. The second way to handle exceptions is to use 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:

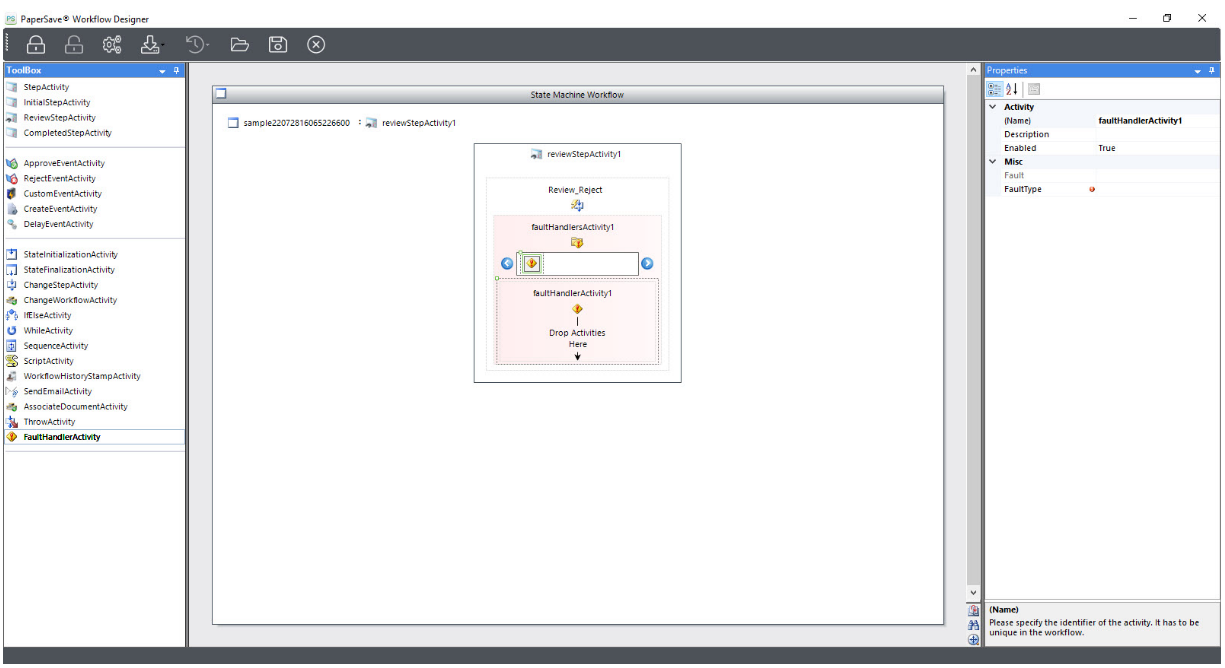
1) Navigate to any **Workflow Event Driven Activity** where you want to add FaultHandlerActivity, expand the **Arrow** icon, and select the View Fault Handlers option from the list as shown below:



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 **Ellipsis** 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 activ-ities.

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 StateInitilization	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.

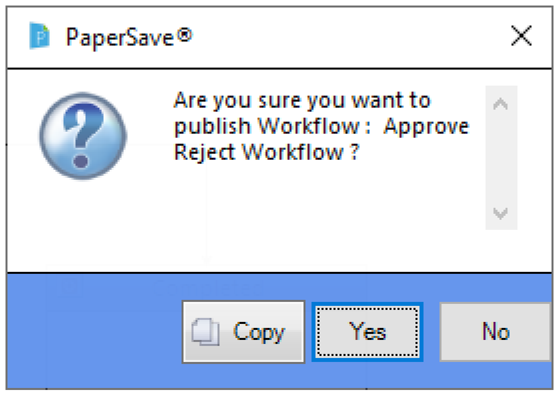
Ribbon Options

Publishing a Workflow

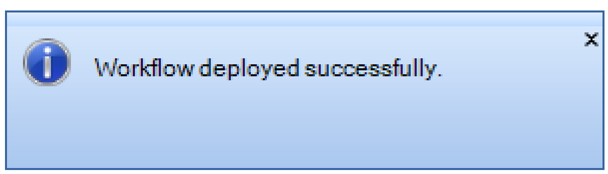
A workflow can only be used if it is in a published state. Publishing a Workflow allows you to publish the Workflow once the workflow is designed successfully.

1) To publish a workflow, click on the **Publish Workflow** button to publish the Workflow.

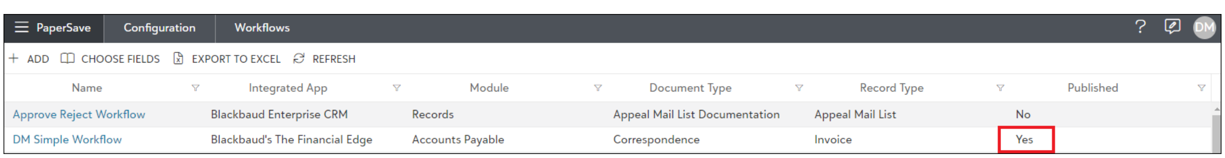
2) A confirmation message is displayed, as shown in the below image. Click on the **Yes** button to publish the workflow.



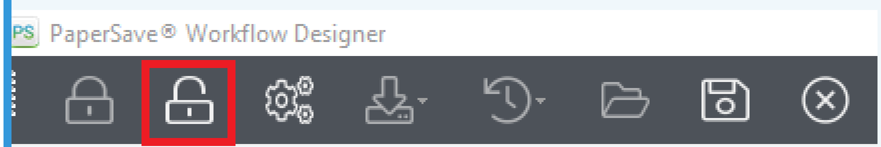
3) Once the workflow is published, then the following message is displayed.



4) You may also view the status as changed to "**Yes**" in a Published column in the workflow, as shown in the below image.



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:

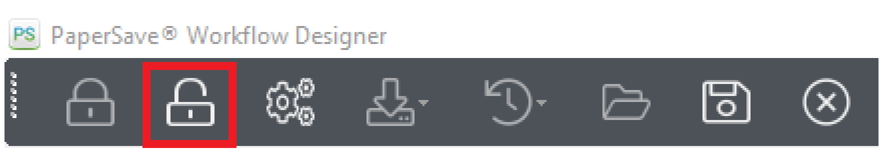


Property Name Properties of the Activity/Events	Property Name Properties of the Activity/Events
Target Owner	ChangeStepActivity, ChangeWorkflowActivity
FieldVisibility	StepActivity
NotificationStyle	StepActivity
NotifyStepOwner	StepActivity
Events	StepActivity
Ranks (for Custom Events)	StepActivity
AllowOwnerChange	StepActivity
Ownership Style	StepActivity
Filter by Tag	StepActivity
Possible Owners	StepActivity
CommentsRequired	ApproveEvent, RejectEvent, and CustomEvent

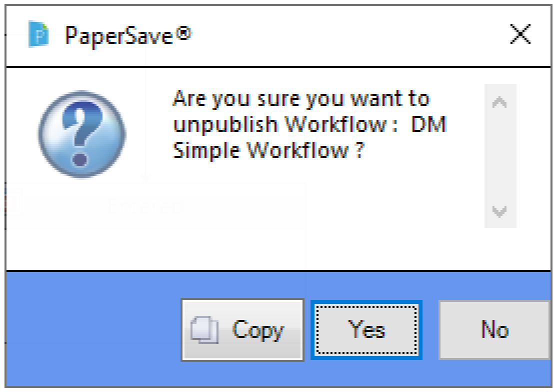
Unpublishing a Workflow

Unpublishing a workflow allows you to unpublish the Workflow and then update it as required.

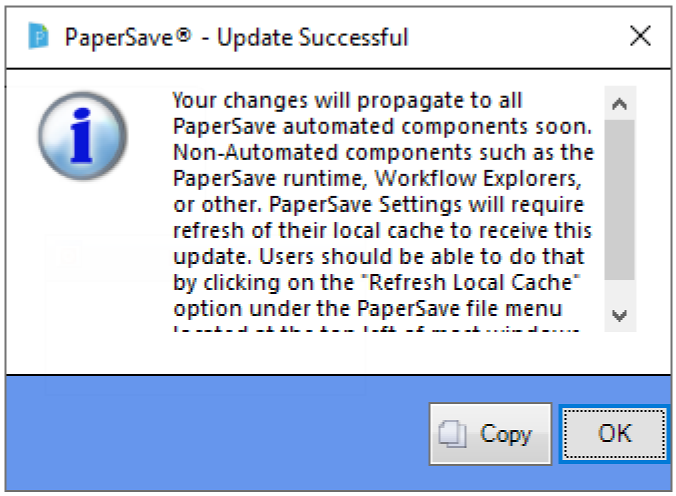
1) To unpublish a workflow, click on the Unpublish Workflow icon, as shown in the below image.



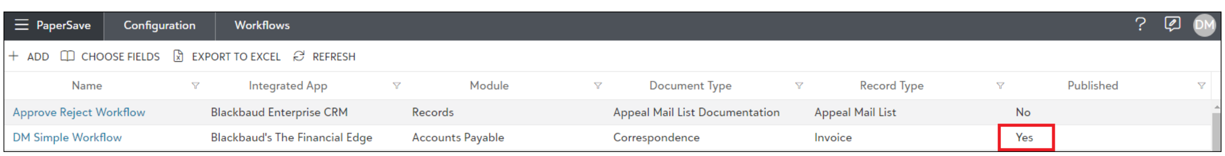
2) A confirmation message is displayed, as shown in the below image. Click on the **Yes** button to unpublish the workflow.



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.

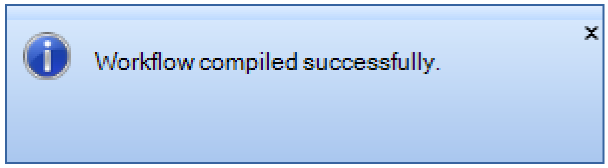


Compiling a Workflow

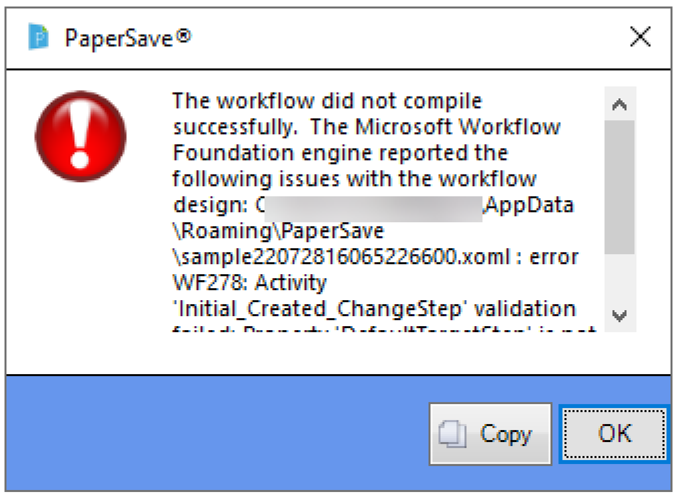
Compiling a workflow allows you to execute the workflow. This will help while creating or modifying the work-flow. Once the workflow is compiled successfully, then you can ensure that there are no errors. If any error occurs, then the same will be displayed.

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.



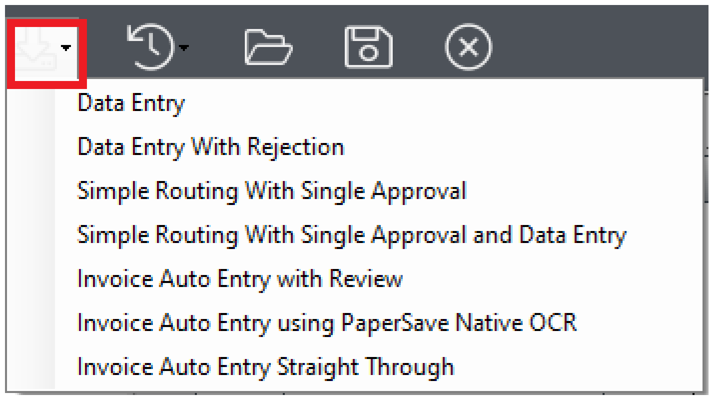
Workflow Templates

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.

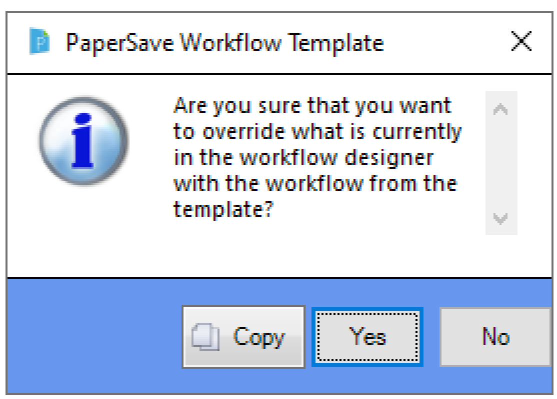
1) To use the workflow template, click on the **Workflow Templates** icon.

2) The list of workflow templates is displayed, as shown below.

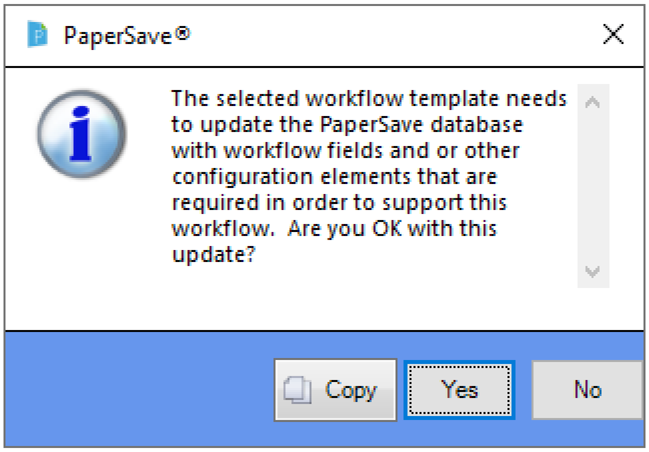


> **Note:**
>
> The list of Workflow Templates displayed is not fixed and may change at any point in time.

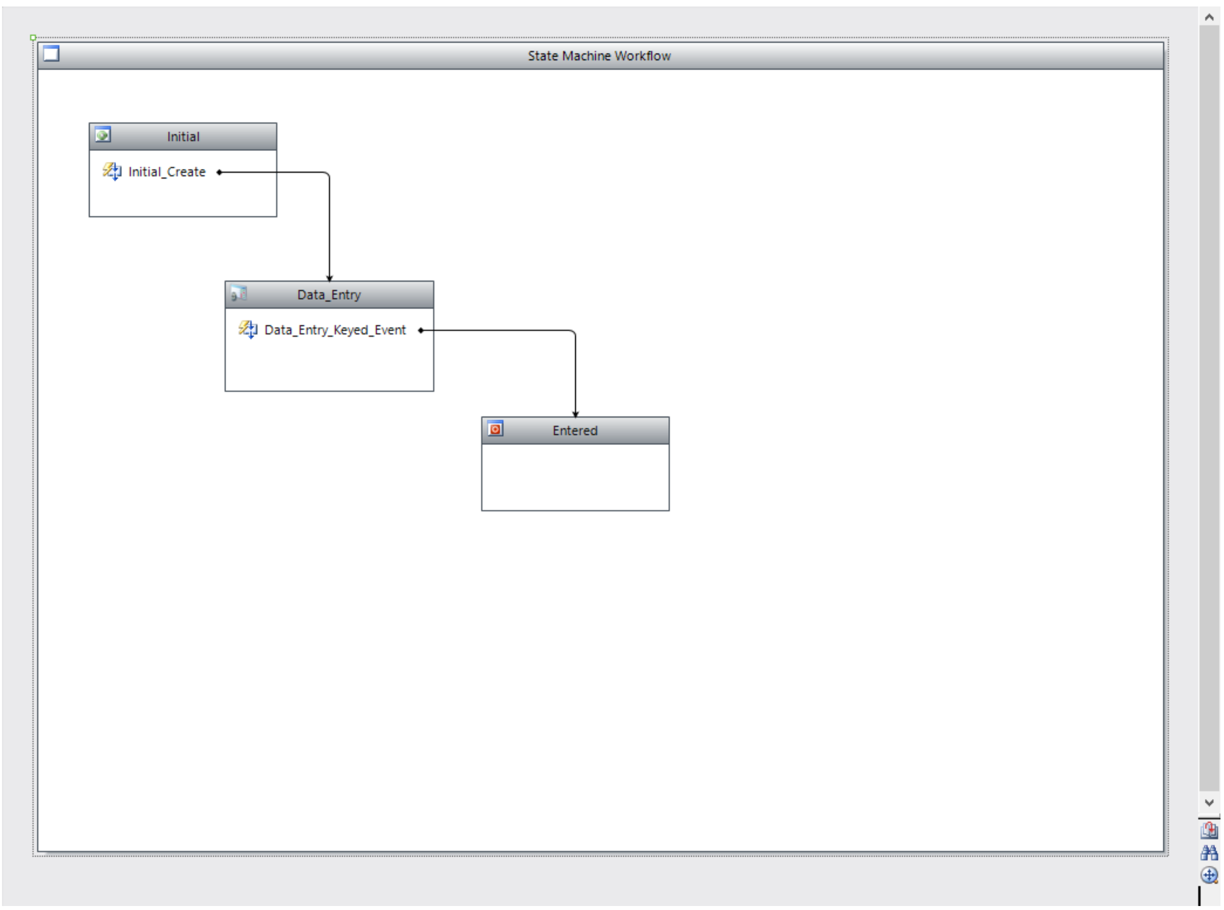
3) Select any workflow template to apply the template in any Document Type. As you select a workflow template, the following message is displayed. Click on the **Yes** button.



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.

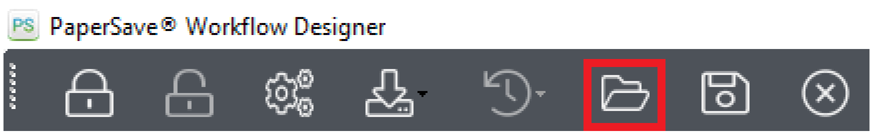
Loading Workflow from File

You can use the Load Workflow From File functionality to load a saved workflow from your system and override the current workflow.

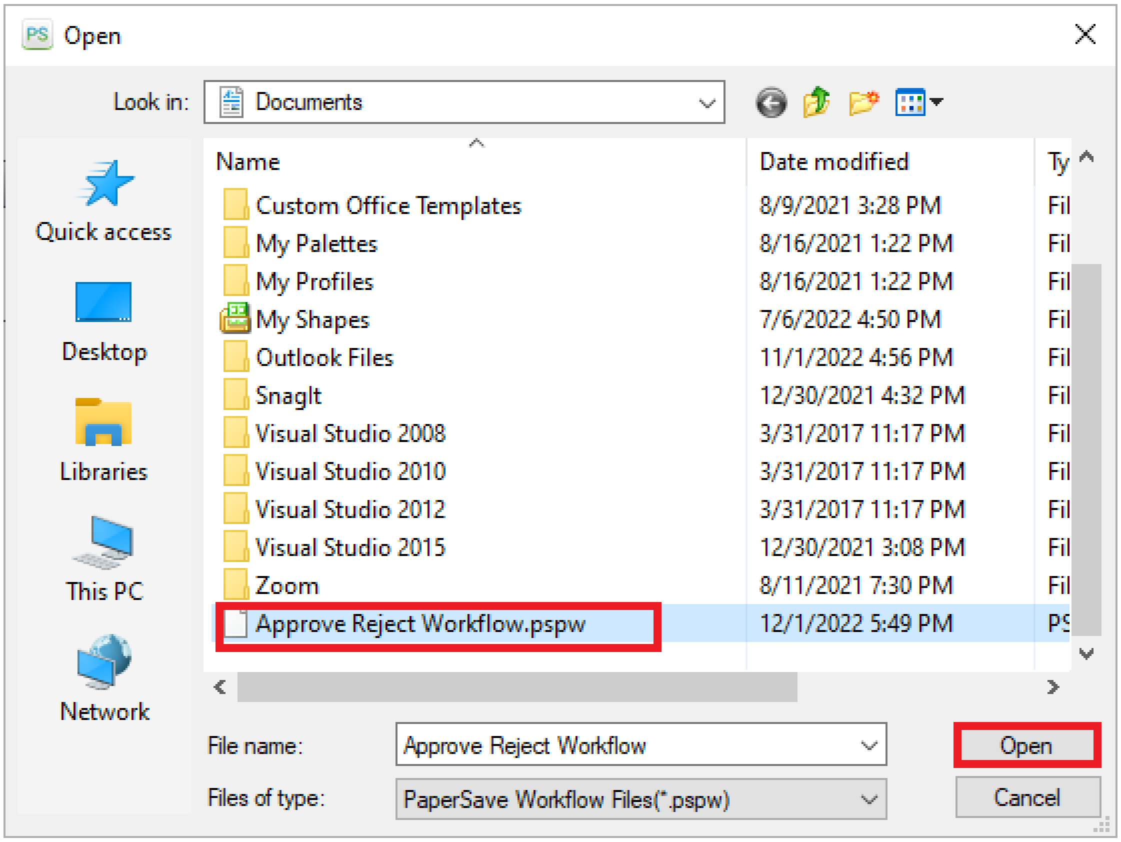
> **Note:**
> This action will override the existing workflow opened in the design section of the workflow.

To load the Workflow from a file, do the following:

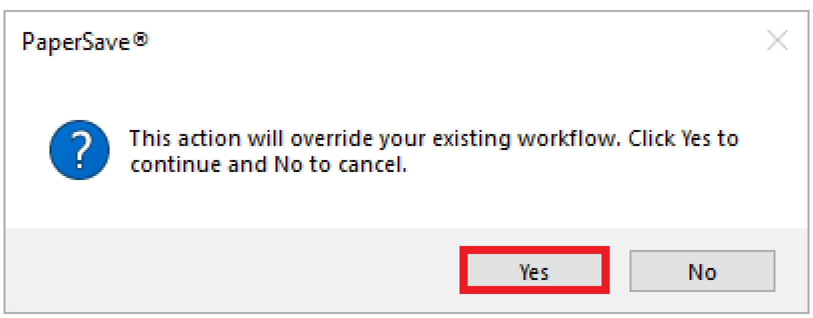
1) Click on the **Load Workflow** from File icon. This will open File Explorer.



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.

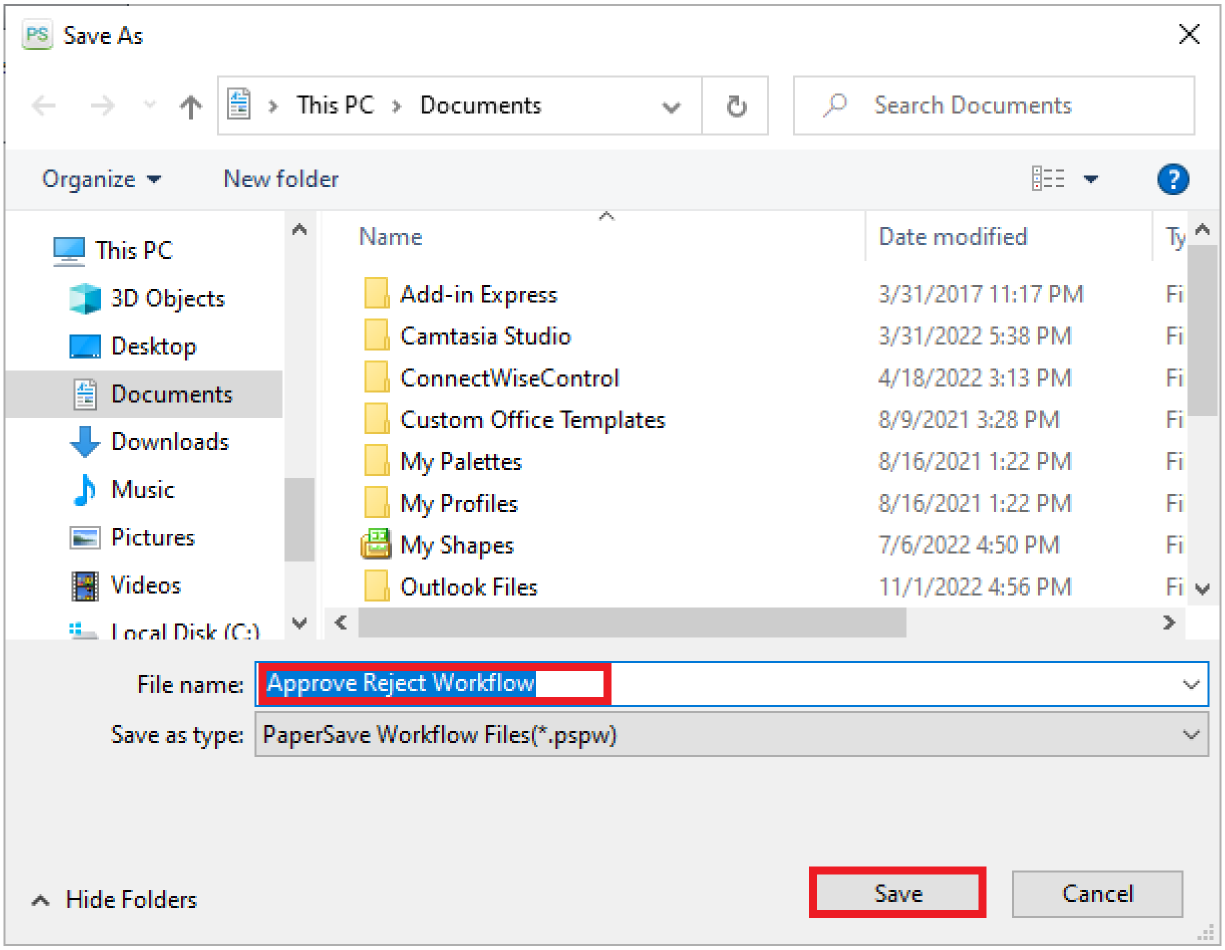
Saving Workflow to File

Saving a Workflow to a File allows you to save the Workflow that you can import later to use in another document type.

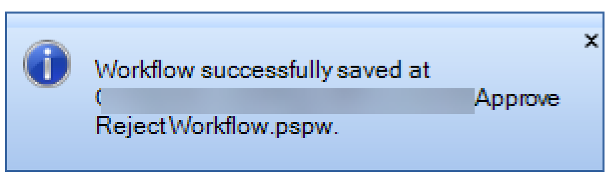
To save a workflow to a file, do the following:

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.

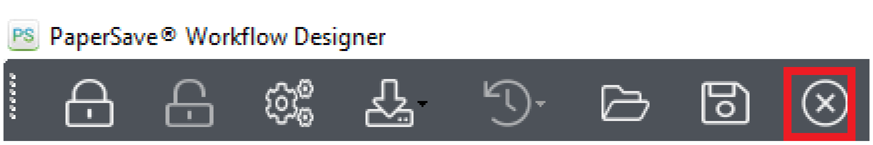


3) A confirmation message is displayed, as shown in the below image.



Closing Designer

To close the workflow designer, click on the **Closs Designer** icon from the toolbar option.



Managing the Workflows

Watch the video to know how to manage the Workflows.

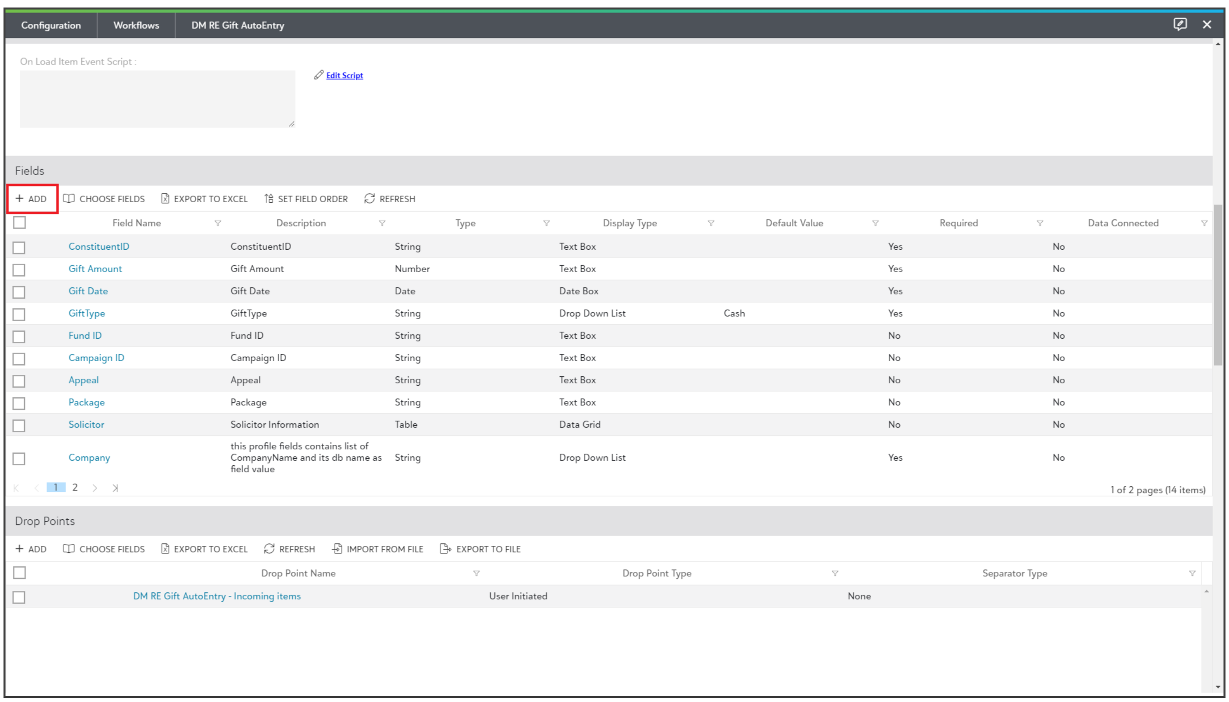
The following are the topics covered in this sections:

- 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.



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

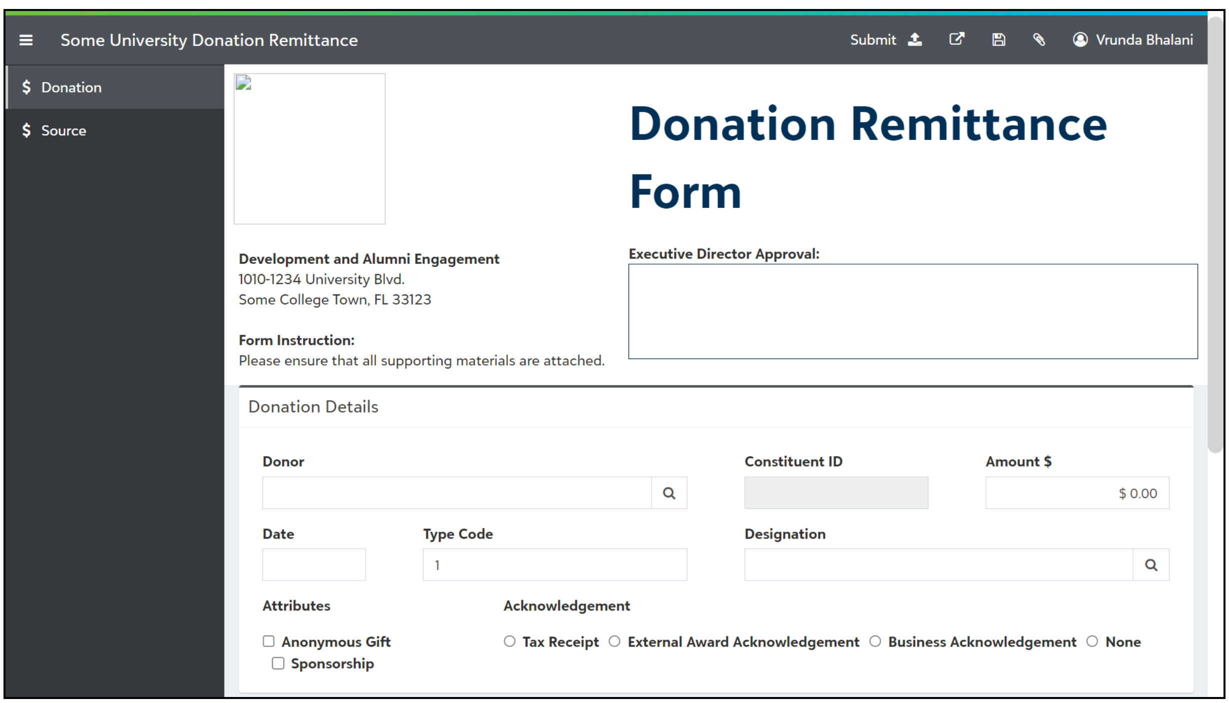
PaperSave Smart Forms provide you with the ability to generate workflow items by filling fields out in a friendly layout designed by workflow administrator. The forms can be accessed by internal users in your organization as well as the external users such as vendors, resellers, distributors, etc. who 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:



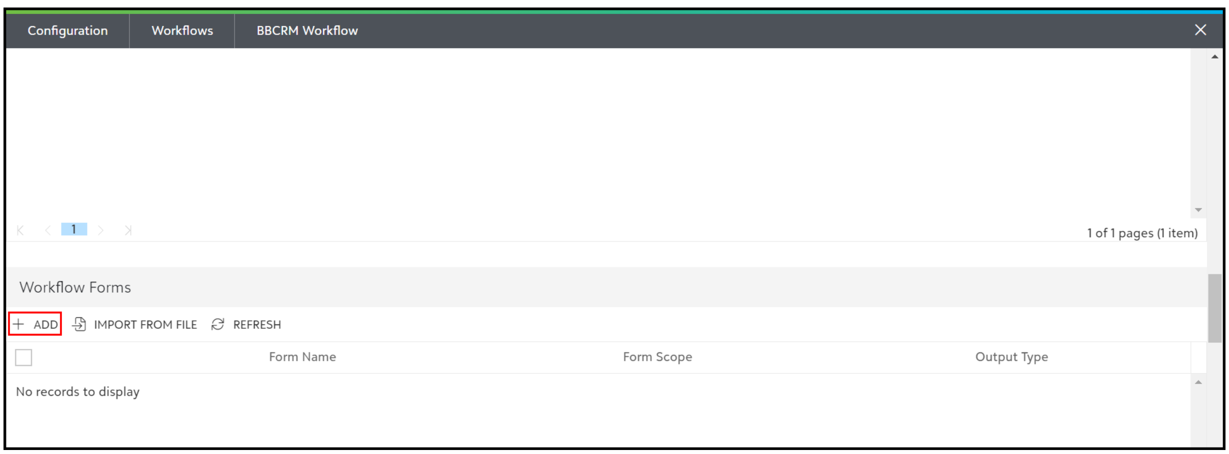
> **Note:** The terms "**Smart Forms**" and "**Workflow Forms**" are used interchangeably in the User Guide. However, the reference to both has the same meaning.

Creating Smart Forms

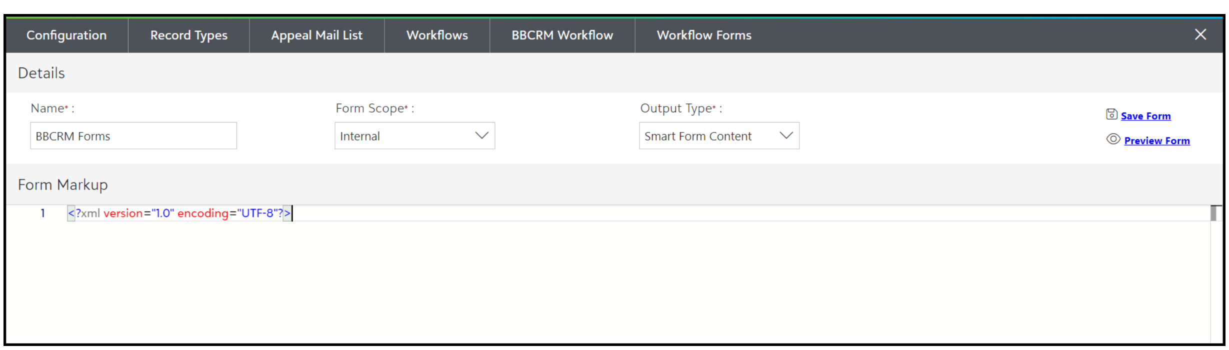
Follow the below steps to create a Smart Form:

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.

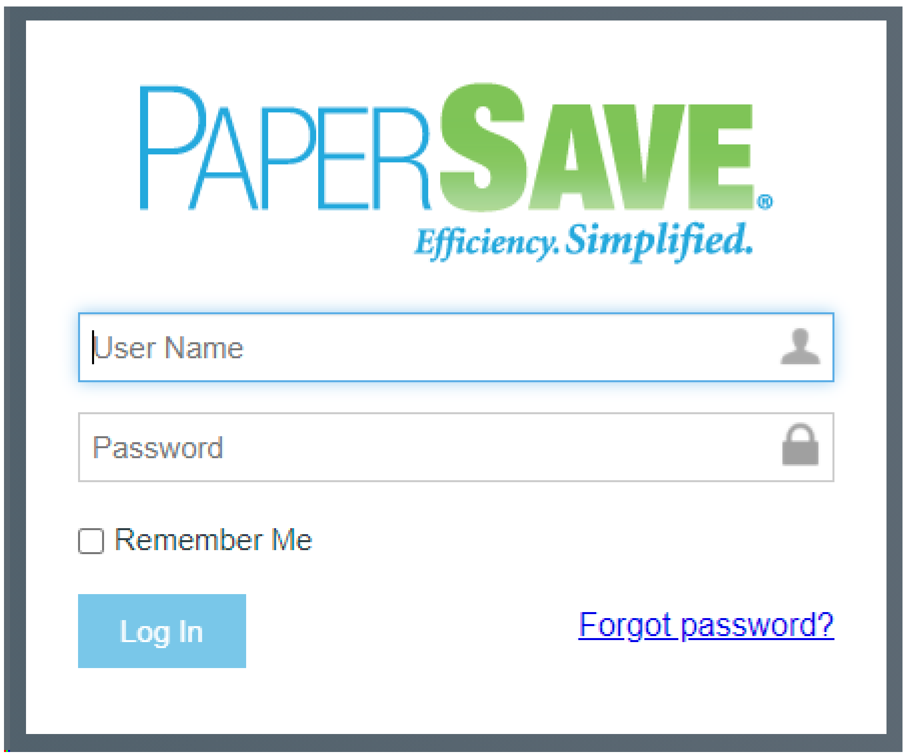


3) Now, it navigates you to the following Workflow Forms screen. Enter the required fields in the Details section such as Workflow Form Name, Form Scope and Output Type. Once you have entered the details, you can add/edit the Smart Form script in the Form Markup section.



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.

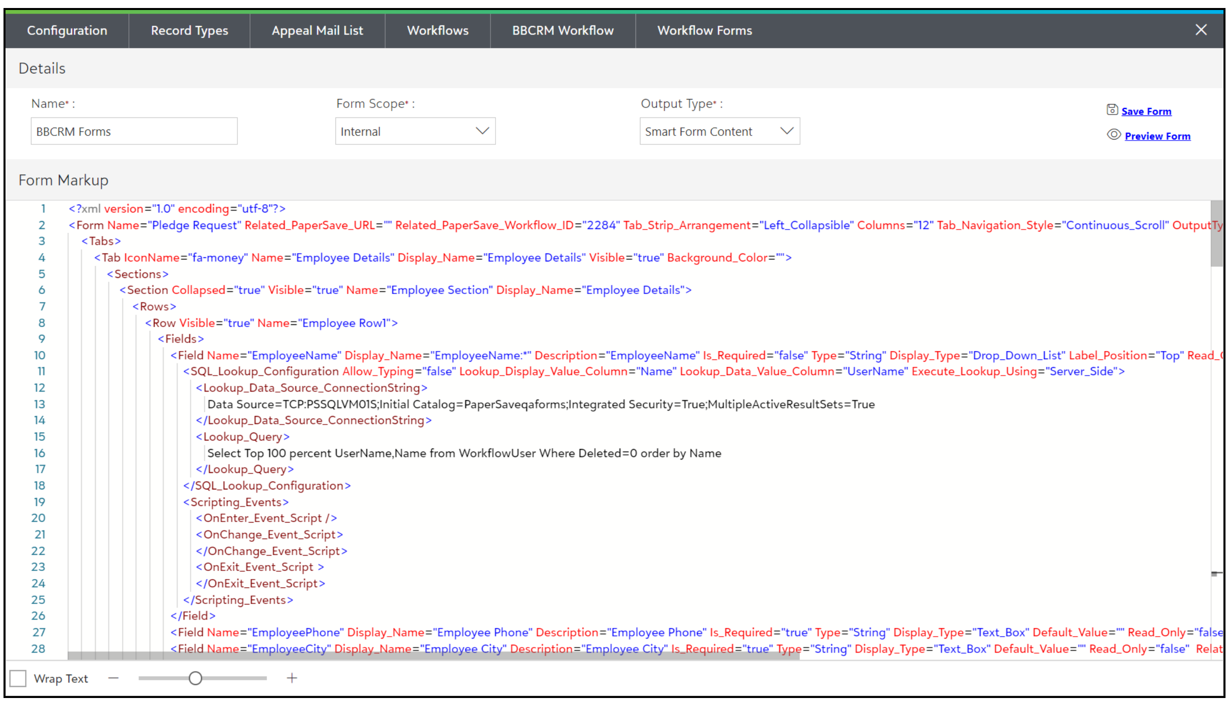


- Choose **Public** to give the form access to the users outside the organization.
- Choose **Both** to give access to the internal and external users.

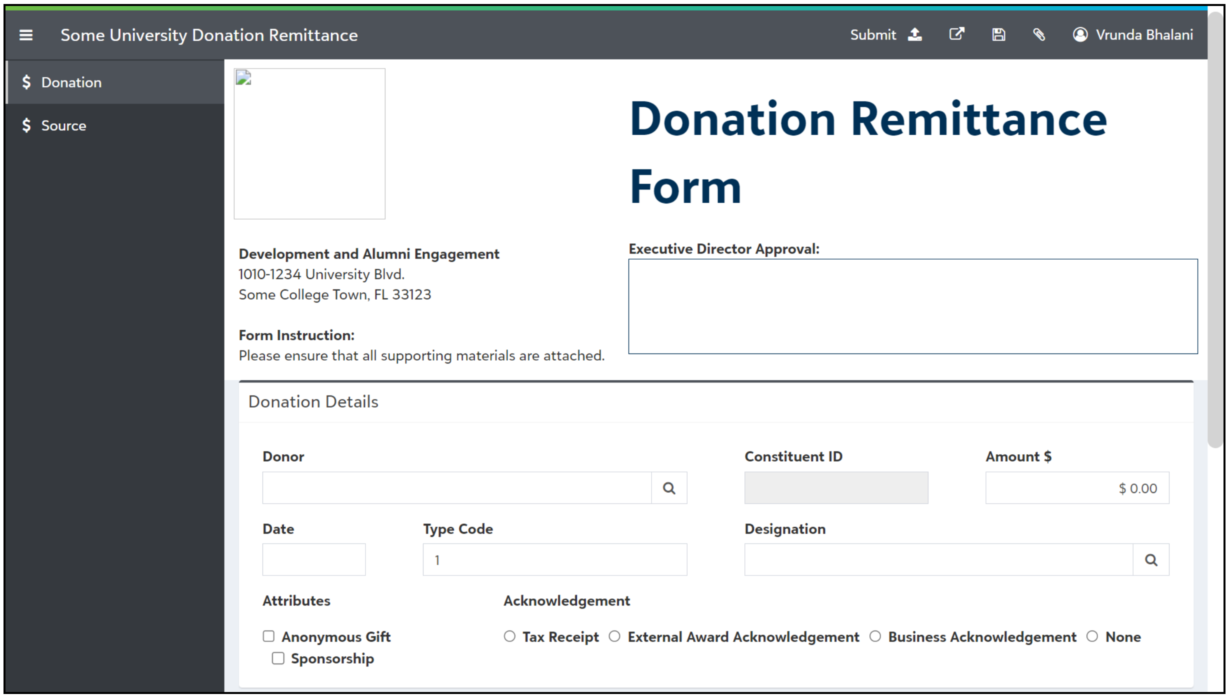
- **Output Type**: Select an appropriate Output Type from the dropdown list.
    - Choose **Smart Form** content when the smart form output should be a pdf generated from the smart form design.
    - Choose **Word Mail Merge** when the smart form output should be a word template(.docx) which populates 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.

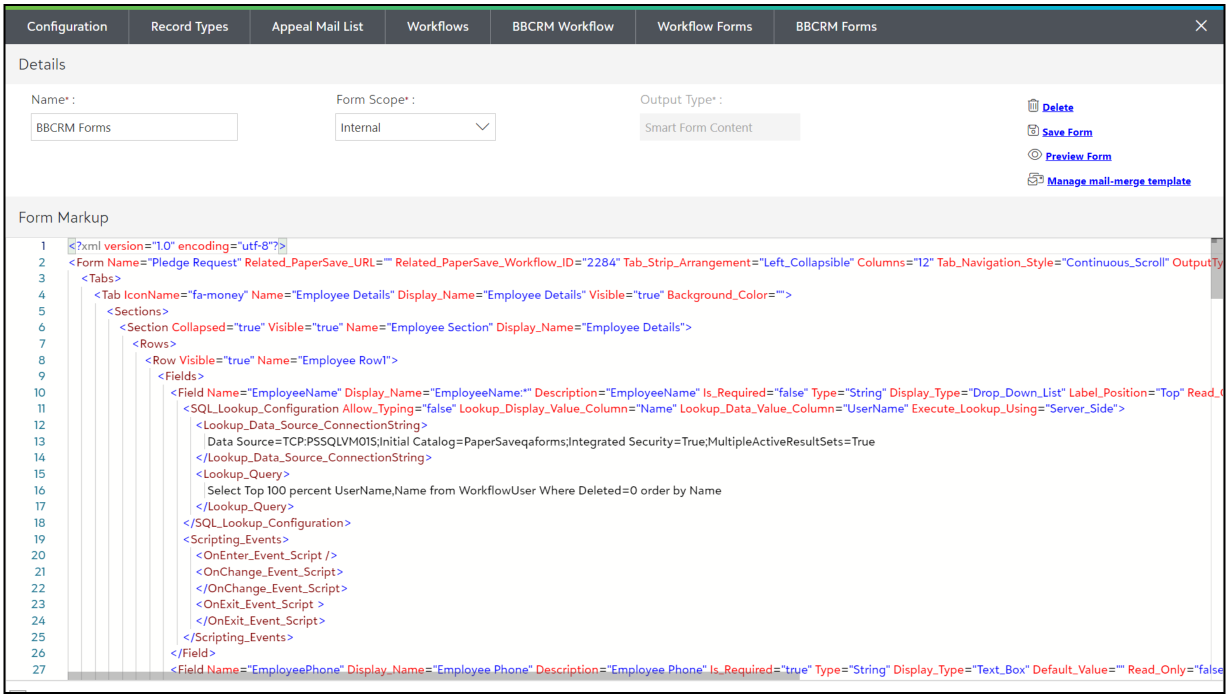


6) Click on **Preview form** to view the HTML version of the form based on the code entered in XML. Preview form will validate if there is an error in the XML. The preview form will display how the form will appear to the user as shown below:

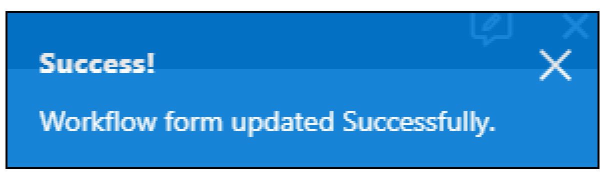


> **Warning:** You must include the attributes "**Related_PaperSave_URL**" and "**Related_PaperSave_Workflow_ID**" in the form markup section as shown in the below screenshot.

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.

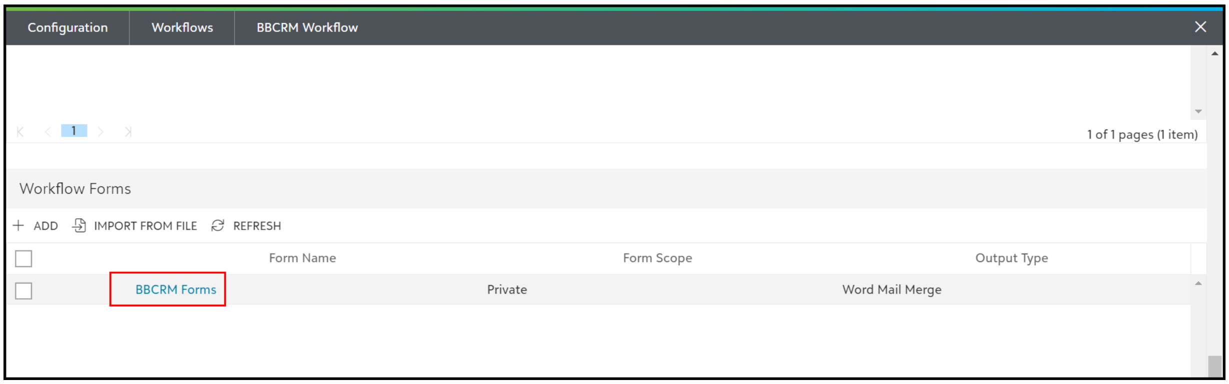


Managing Smart Forms

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.

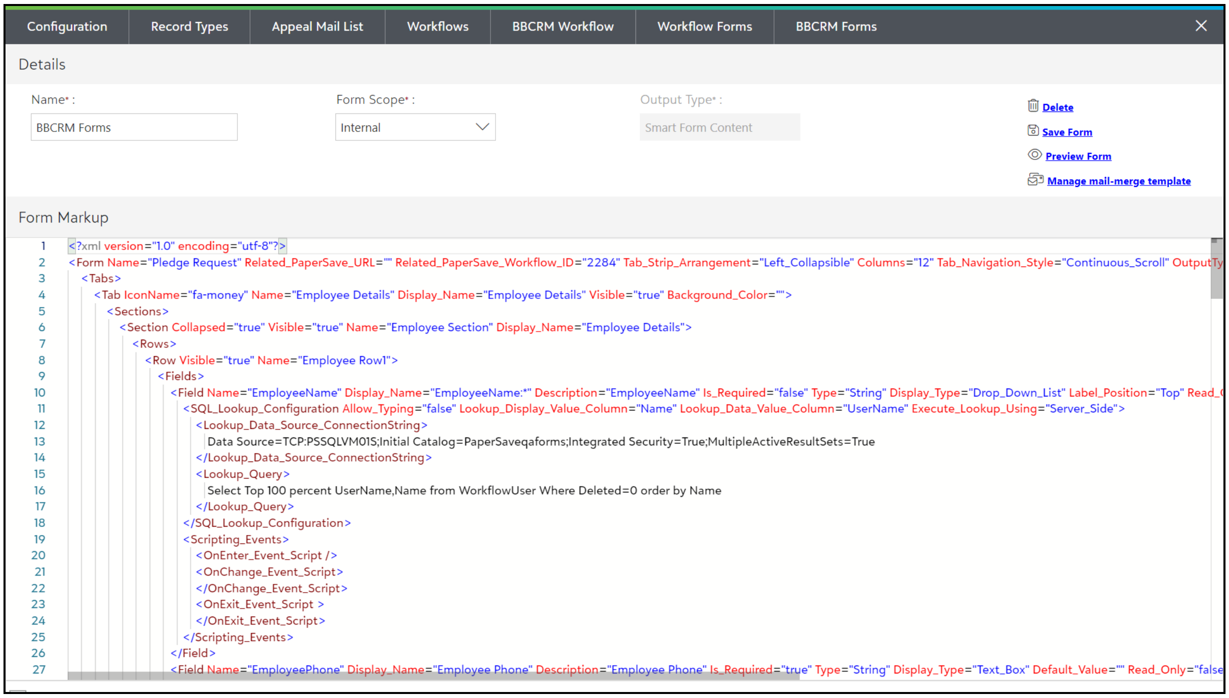


List Toolbar options in Workflow Forms

The following are the Toolbar options available in Workflow Forms:

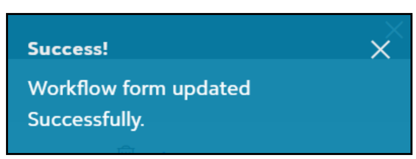
- +**ADD**: Click on **+ADD** to create a new Smart Form.
- **IMPORT FROM FILE** (COMING SOON): Click on this option to import Smart Form from another file.
- **REFRESH**: Click on **REFRESH** to see the latest changes in the Workflow forms list.

3) Click on the Workflow Form name to open it in the edit mode, as shown in the below screen.

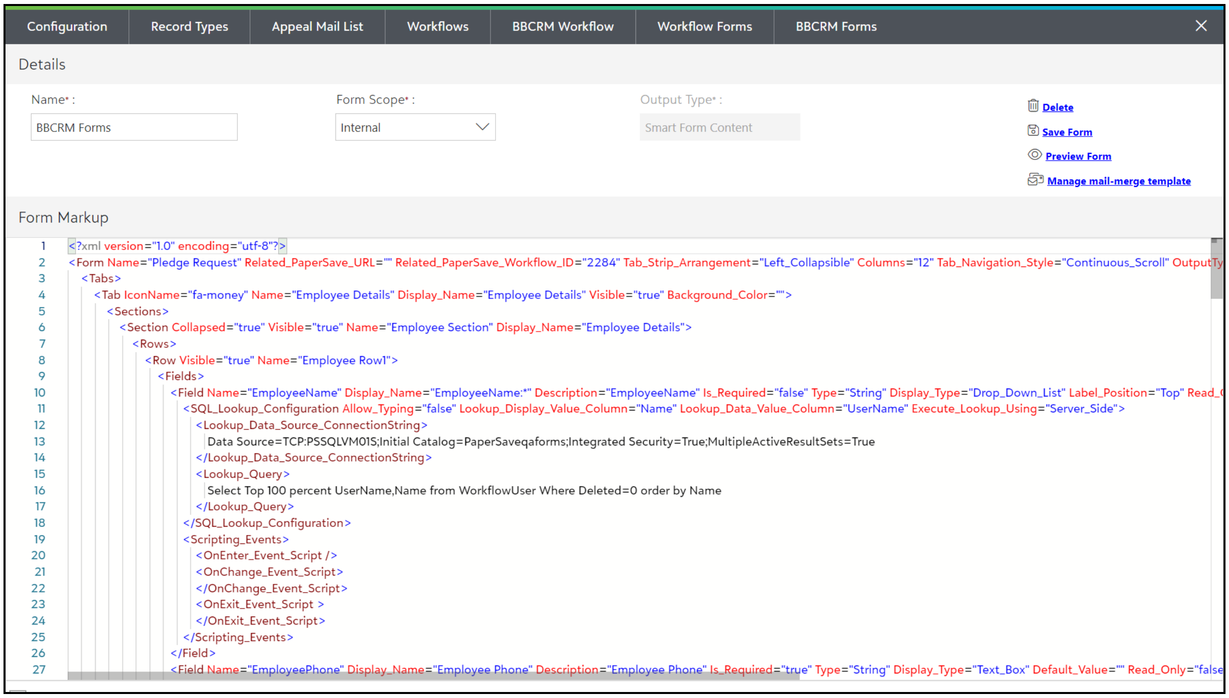


4) You can edit the smart form details such as Name and Form Scope. Besides, you can edit the Form Markup to see desired changes in the design.

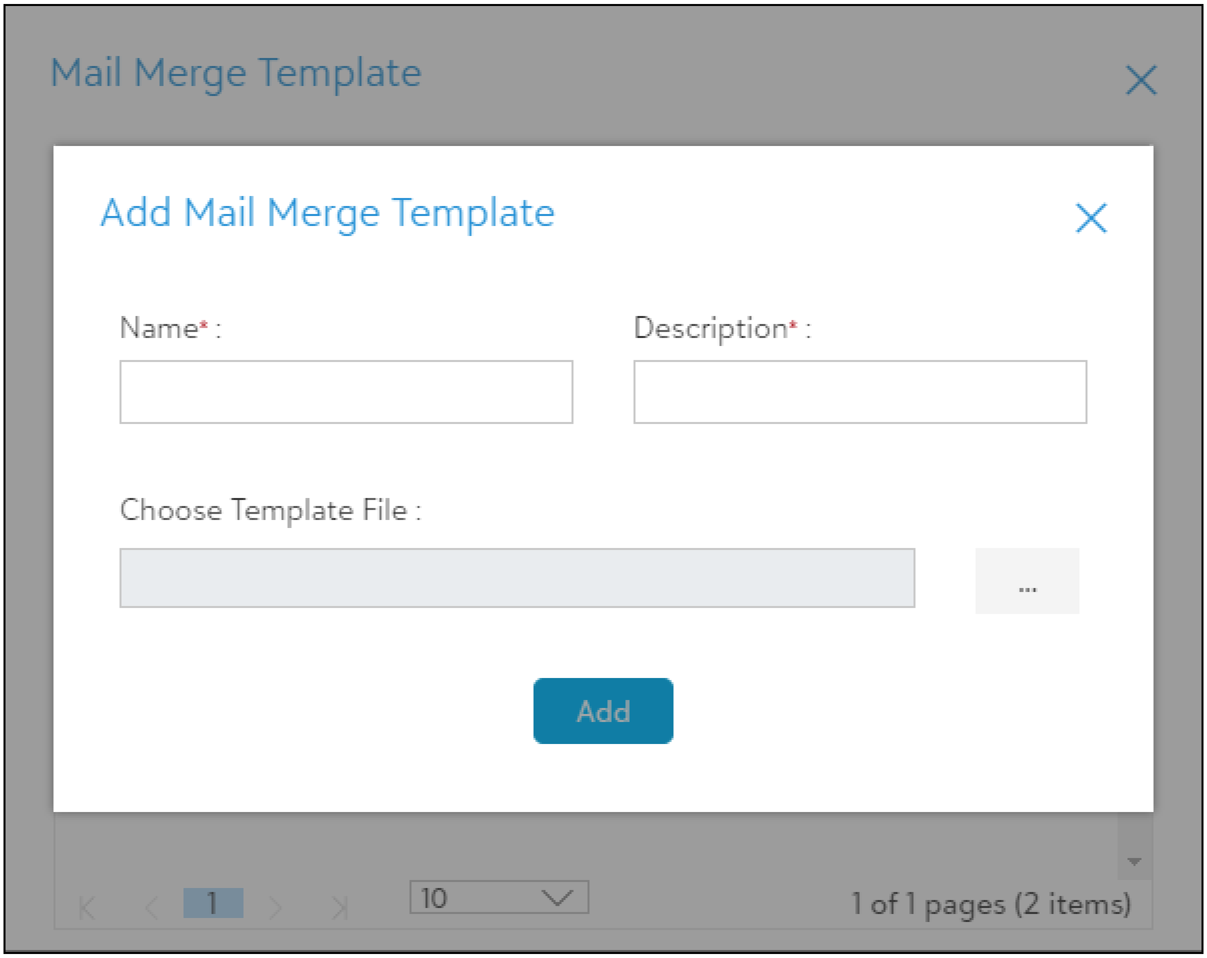
- Click on "**Preview Form**" to see the changes in the form UI.
- Click on **Save Form** once you are done editing the Smart Form. You will see a success notification titled "Workflow form updated successfully" in the top-right corner of the screen.



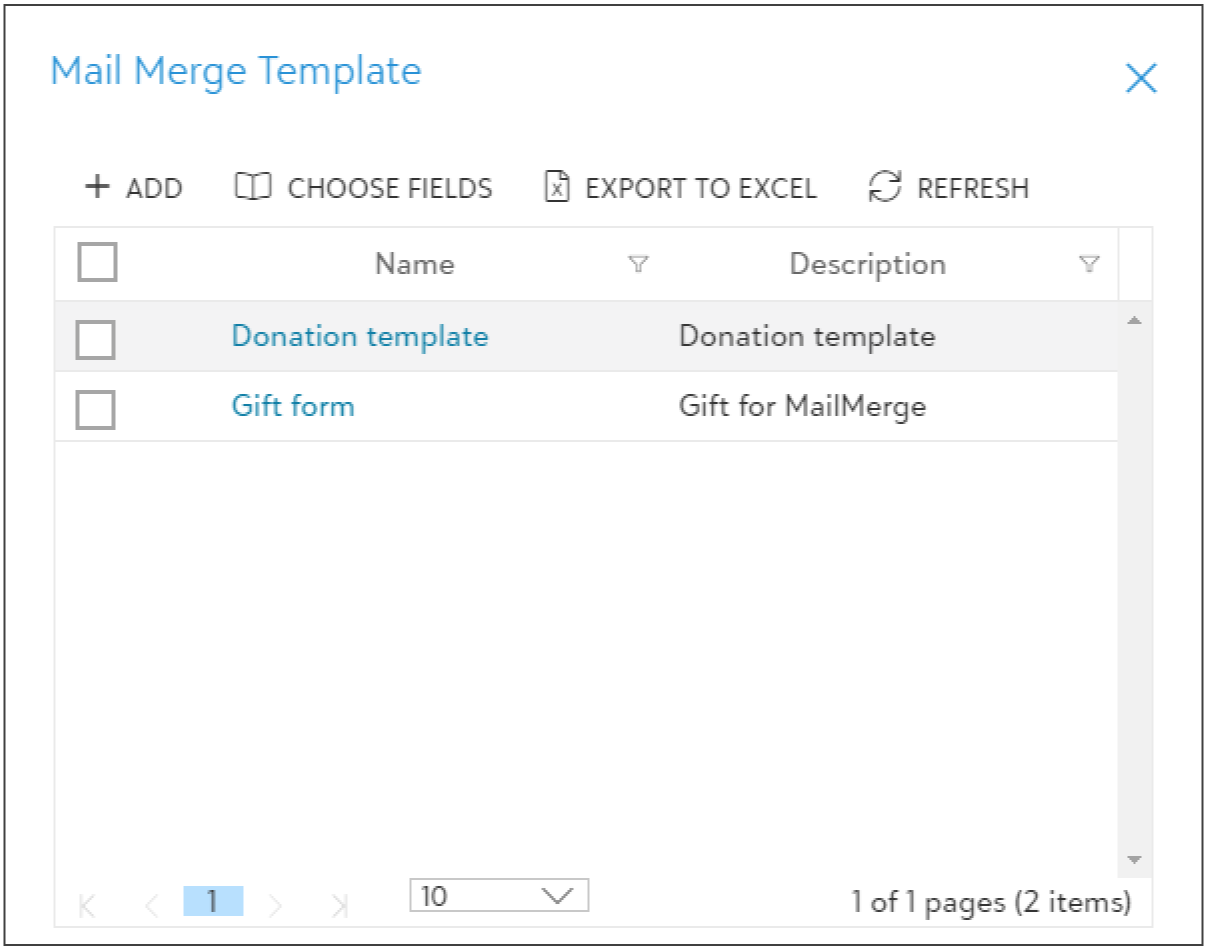
5) If the output Type of Smart form is **Word Mail Merge**, then the smart form when opened in the edit mode will appear as shown in the below screen. You will see an additional option "Manage mail-merge template" in the Details section below "Preview Form" option where you can either choose to create a new mail merge template or manage the uploaded template.



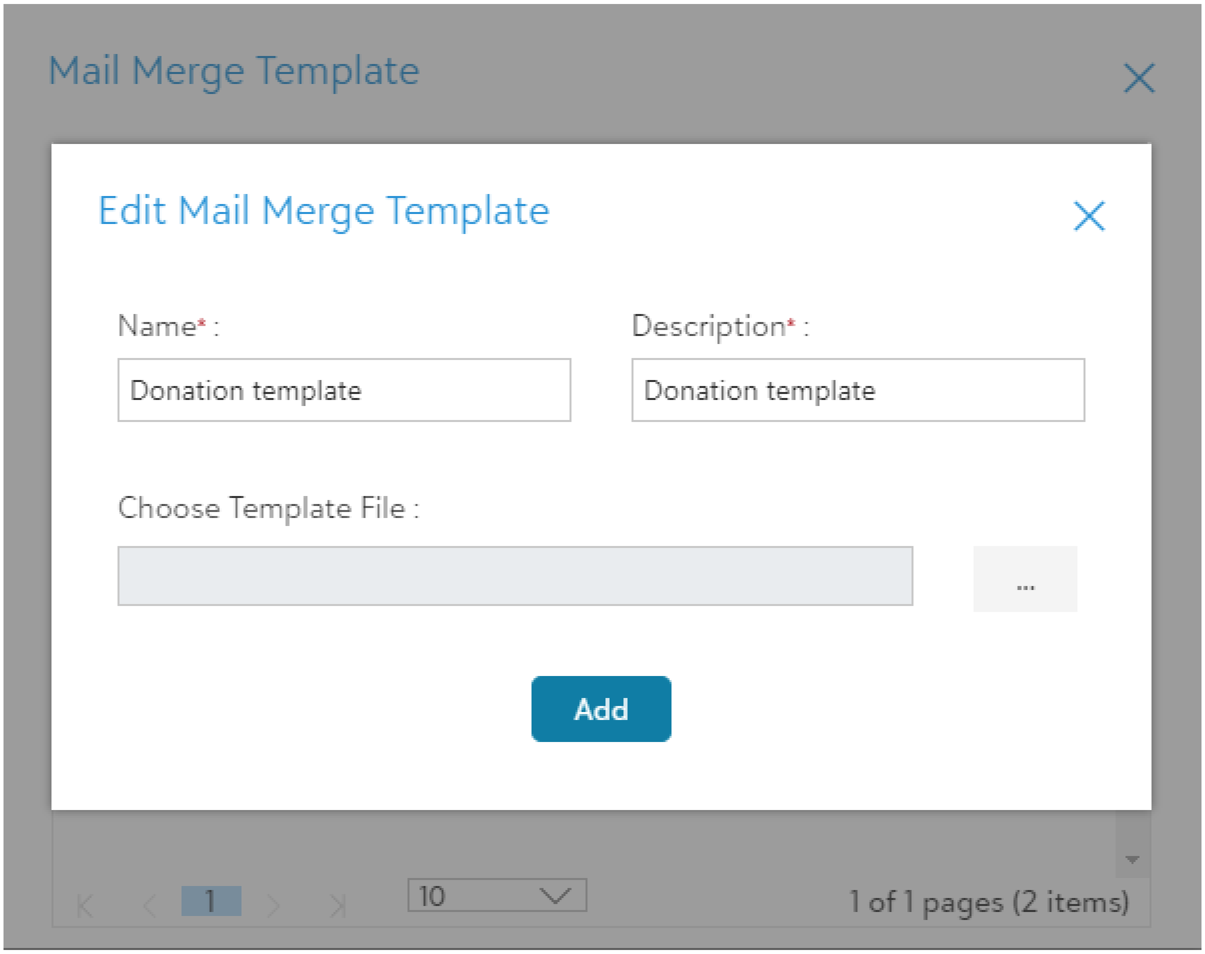
6) Click on "**Manage mail merge template**" to navigate to the Mail Merge Template dialog as shown in the below screen. Click on **+ADD** to create a mail merge template. Enter the Name, Description, and upload a word template from your file explorer. Click on **Add** to finish creating a new template.



- Also, if there is an existing Mail merge template, click on the template to open in the edit mode.



- 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.



- 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.

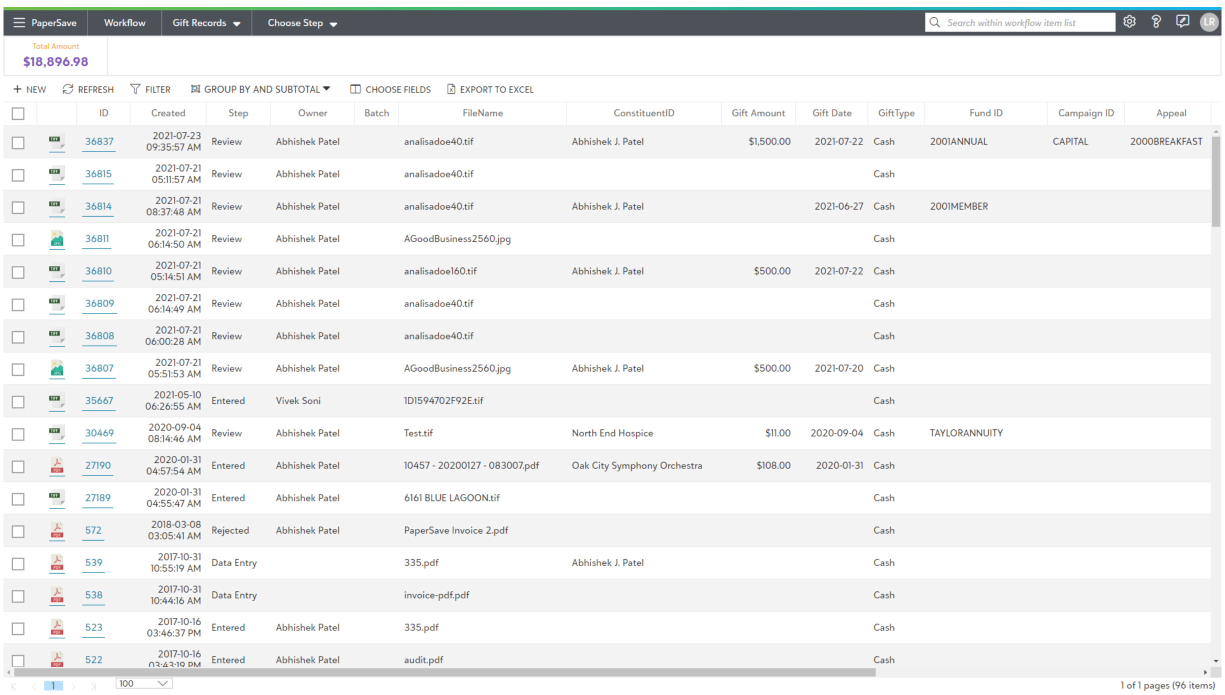
> **Note:** Click here to learn more about Smart forms, including how to access them, view submitted forms in Workflow, and modify values for submitted forms.

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:



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

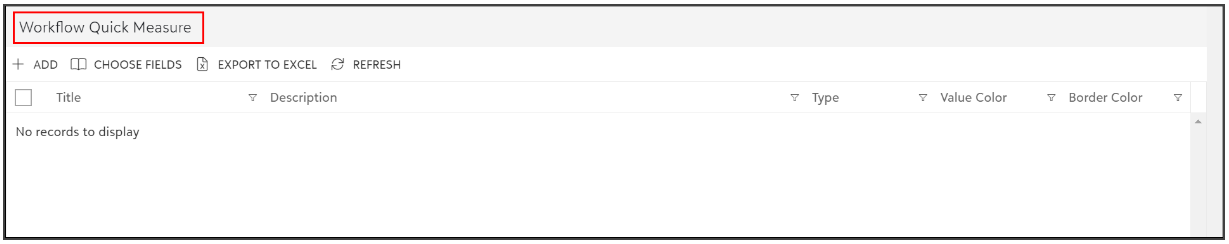
You can perform specific calculations on the Workflow and Document Type fields by adding Workflow Quick Measures for the selected Workflow.

Watch the video to know the steps to add the Workflow Quick Measure.

Following are the steps to add a Workflow Quick Measure:

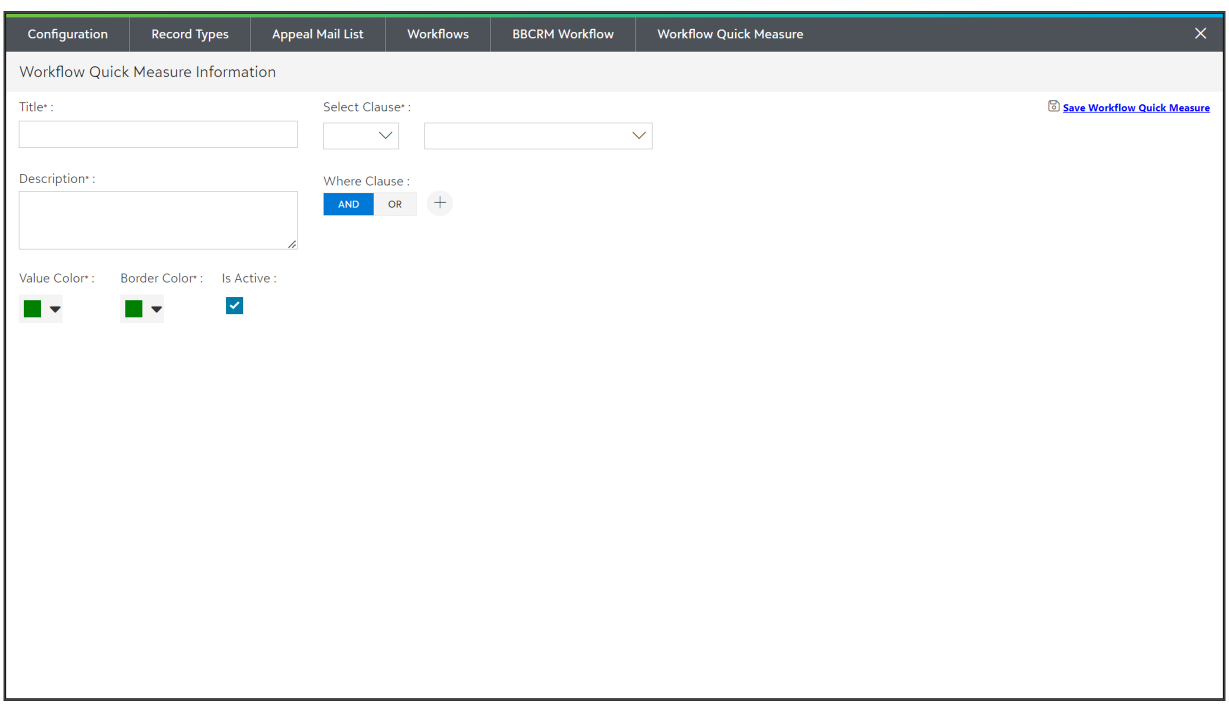
1) Click on **Workflows** tile in the Workflow & Automation section of the Configuration Area.

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.



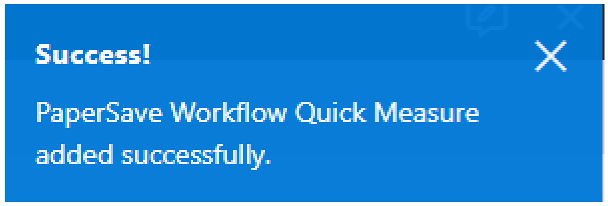
- **Title:** Enter the text to be displayed as the name of the Quick Measure above the list toolbar of the Workflow item list.
- **Description:** Enter the description to provide more information to display it when hovered over the Workflow Quick Measure title.
- **Value Color:** Select the color to 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:

TOP1	This function returns the 1st value in the list for the selected field.
SUM	This function gives the sum of the values in the selected field.
AVG	This function calculates and returns the average value of the selected numeric field.
MIN	This function returns the minimum value of the selected field. **Note:** If the selected field contains alpha characters, then it will return the smallest, that is, A is smaller than C.
MAX	This function returns the maximum value of the selected field. **Note:** If the selected field contains alpha characters, then it will return the greatest, that is, C is greater than A.
COUNT	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.



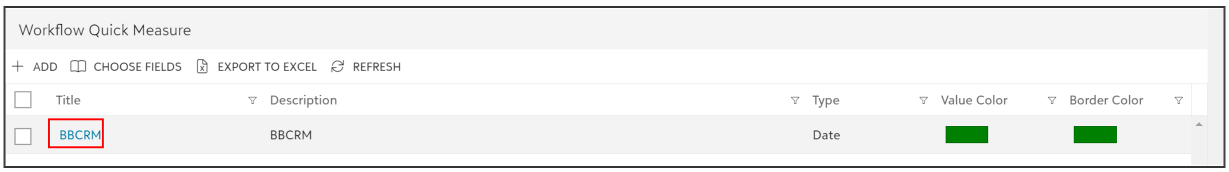
Managing a Workflow Quick Measure

Watch the video to know how to manage the Workflow Quick Measure.

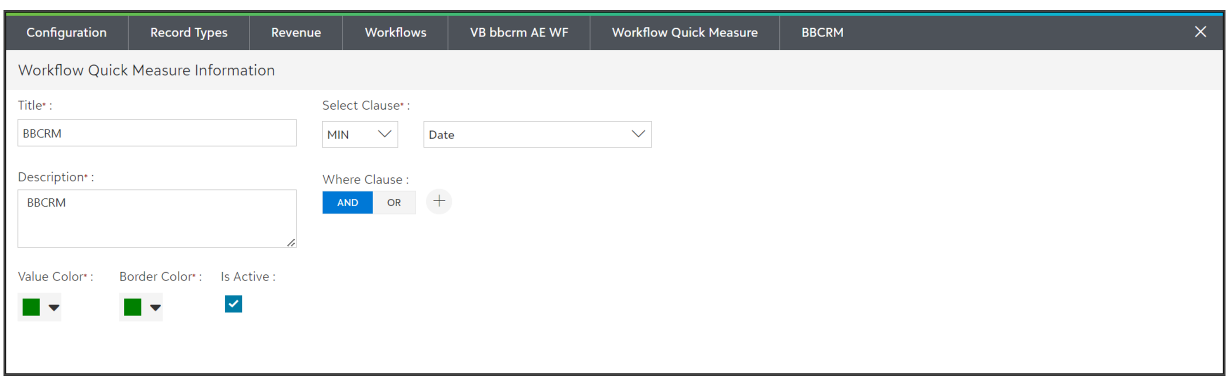
You can also follow the below steps to manage a Workflow Quick Measure:

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.

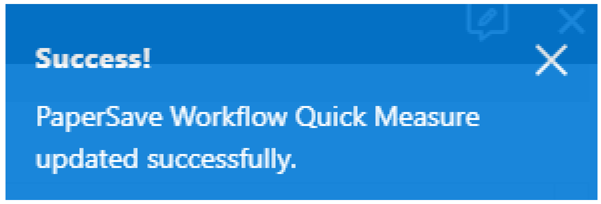


3) Now, click on the Title (hyperlink) of an existing Workflow Quick Measure to open it in edit mode, as shown in the below screen.



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.

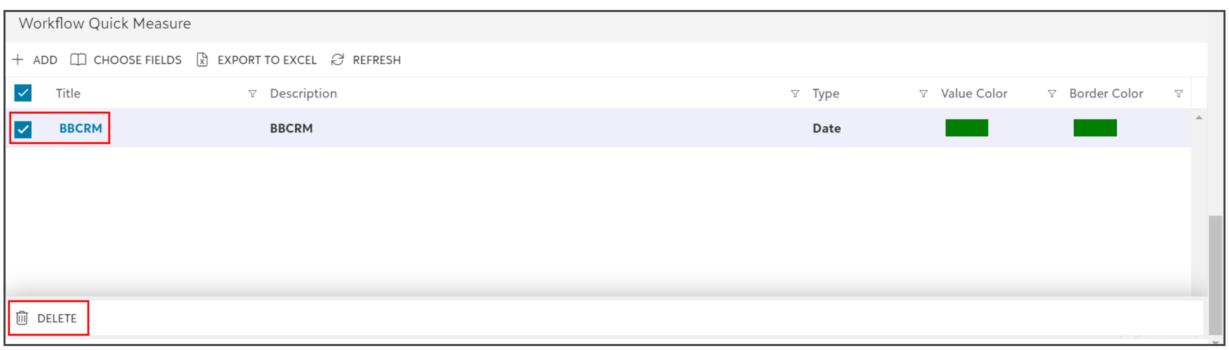


Deleting Workflow Quick Measure

Follow the below steps to delete the Workflow Quick Measure:

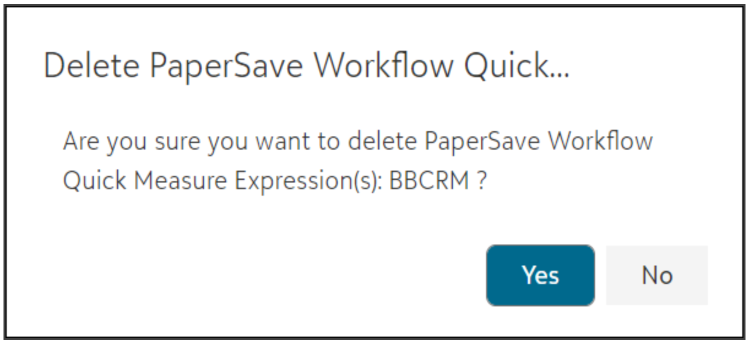
1) Click on **Workflows** tile in the Workflow & Automation section of the Configuration Area.

2) Select your desired Workflow from the list and scroll down to the Workflow Quick Measure section, as shown in the below screen.



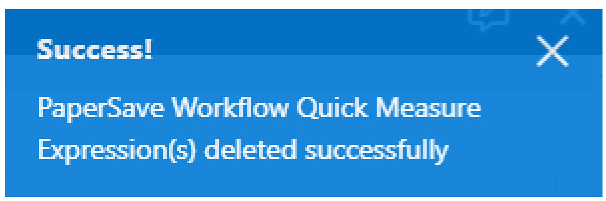
3) Now, select the existing Workflow Quick Measure(s) using the checkbox or directly clicking on the row(s) and then click on the **Delete** option from the slide-up panel as shown in the below screen.

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.

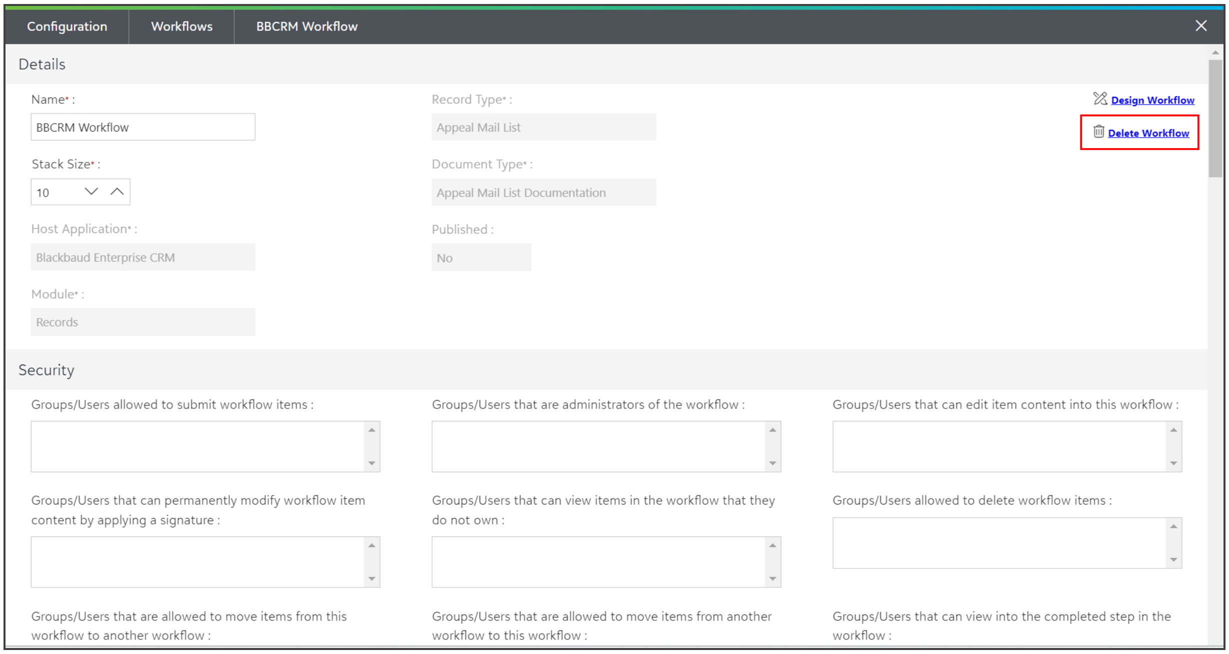
6) On deletion, it will show the success/failure message on the top-right corner of the screen, as shown below.



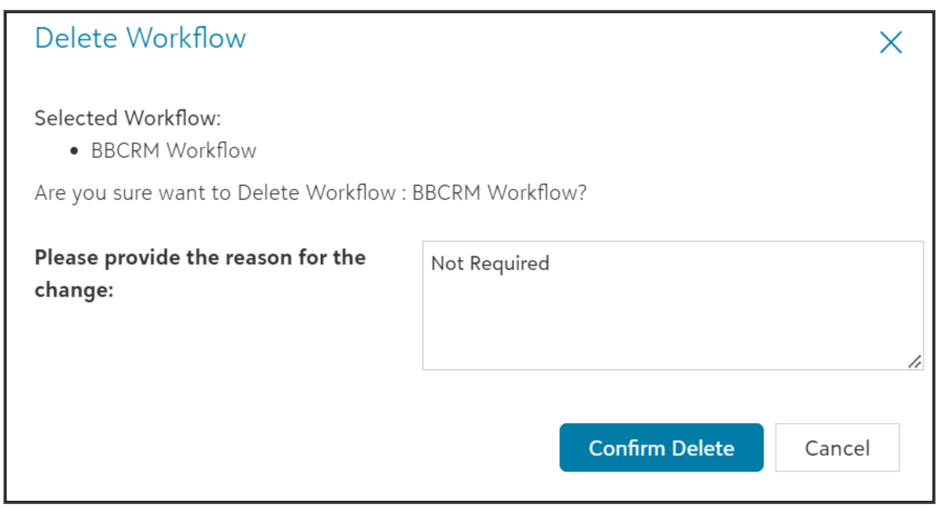
Deleting a Workflow

You can delete the Workflow by using the following steps:

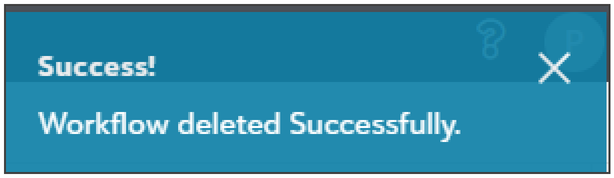
1) Open any existing Workflow and click on the **Delete Workflow** button within the full-page dialog box as shown in the below screen.



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.



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

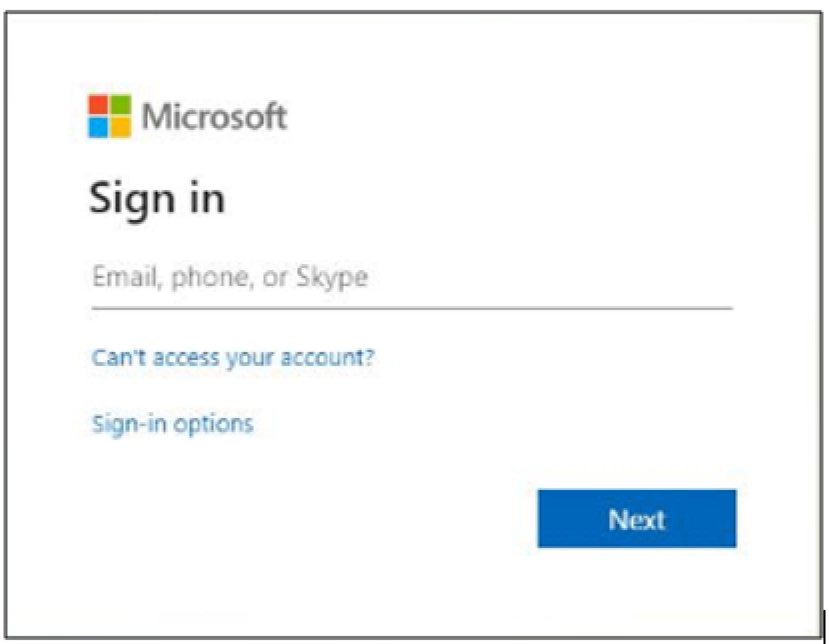
1) To allow PaperSave to read a Microsoft 365 or Outlook mailbox, a user with Global Admin rights in your Organization's Active Directory must grant one-time Admin access.

2) The following is an example of an Admin consent URL. Click here for more details on Admin consent URL.

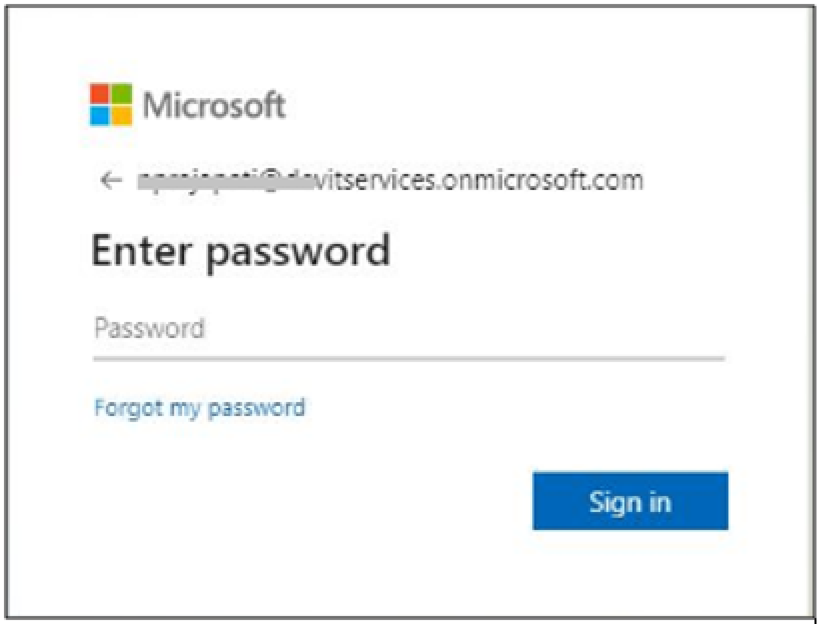
https://login.microsoftonline.com/**tenant-id**/adminconsent?client_id=cc3de383-ba86-4c8c-b515-afb4ec4fd175

where **tenant-id** is your Organization's Active Directory ID.

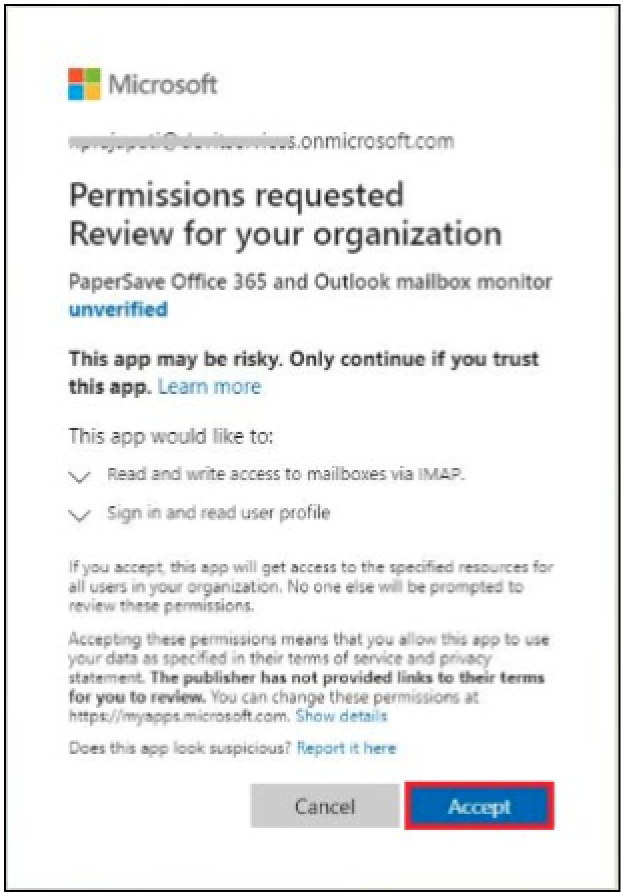
3) Enter the **respective tenant ID** in the above URL and access the URL in the browser. You will see a prompt. Enter the log in credentials (Global Admin) and click on **Next** to proceed as shown in the below screen.



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.

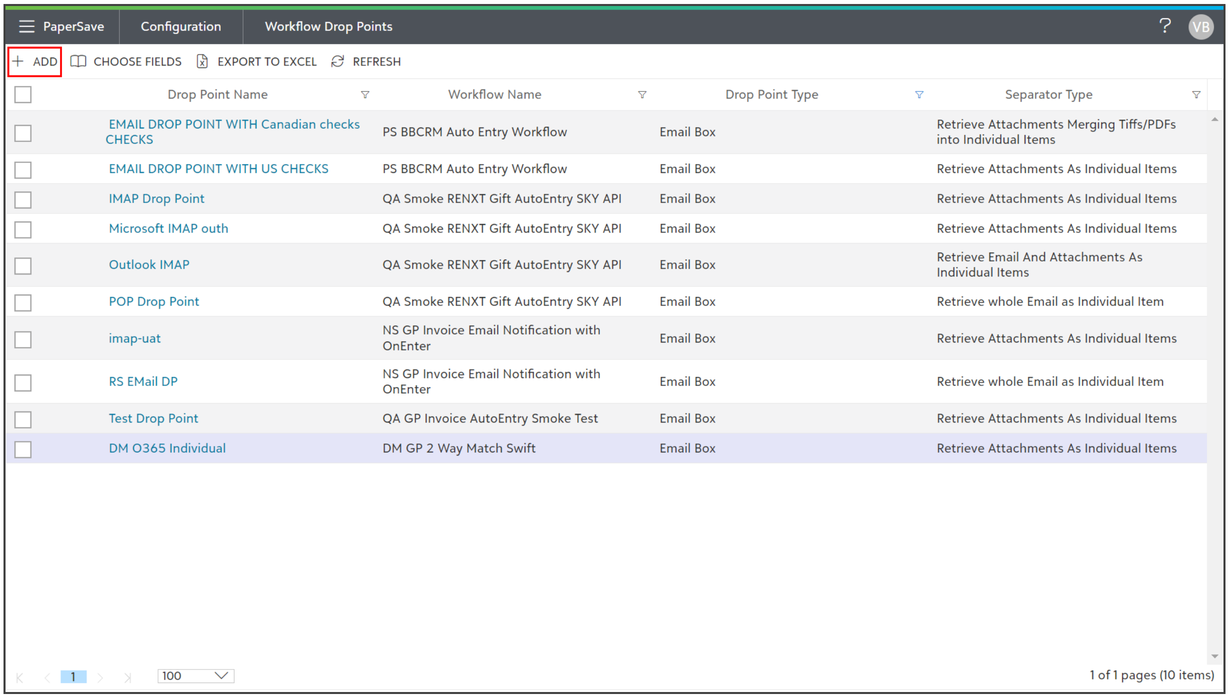


Steps to create an Email Box Type Drop Point with Mail Server Type of Microsoft 365 or Outlook

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.

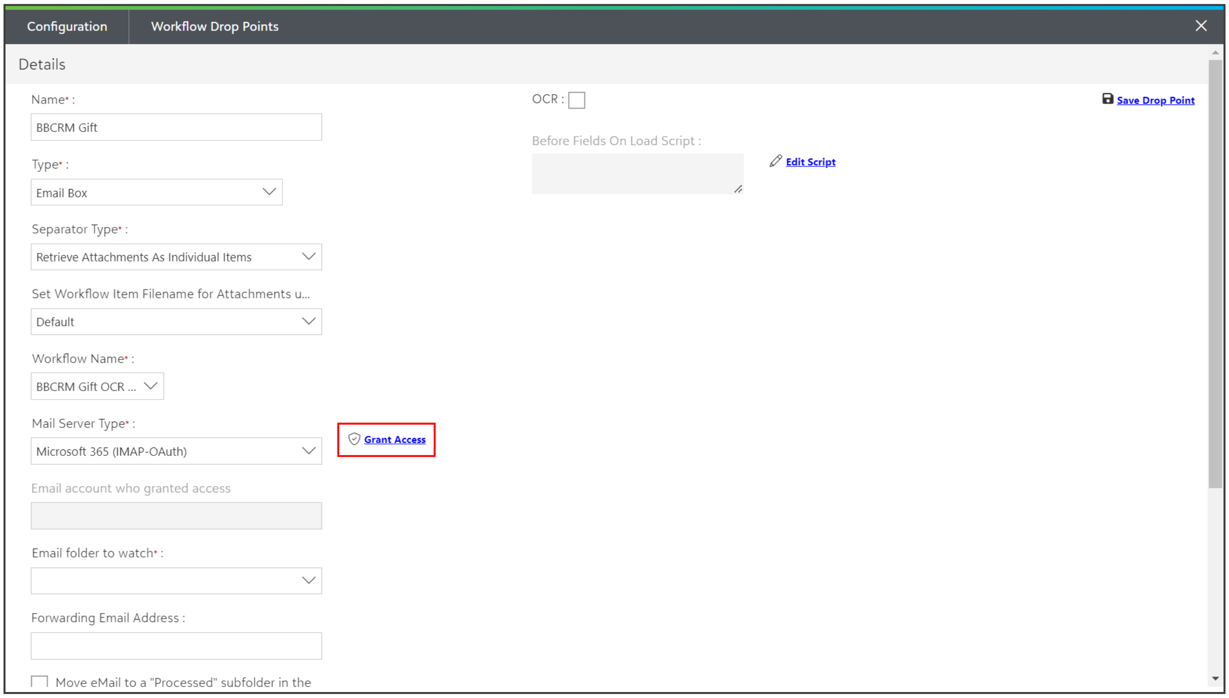
2) Workflow Drop Points screen appears from where click on **+ADD** to create a new drop point.



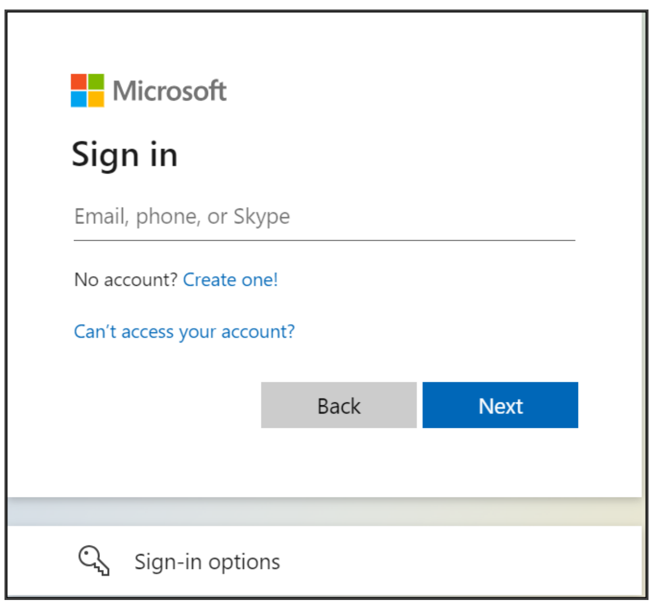
5) Enter the following Drop Point details:

- 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.

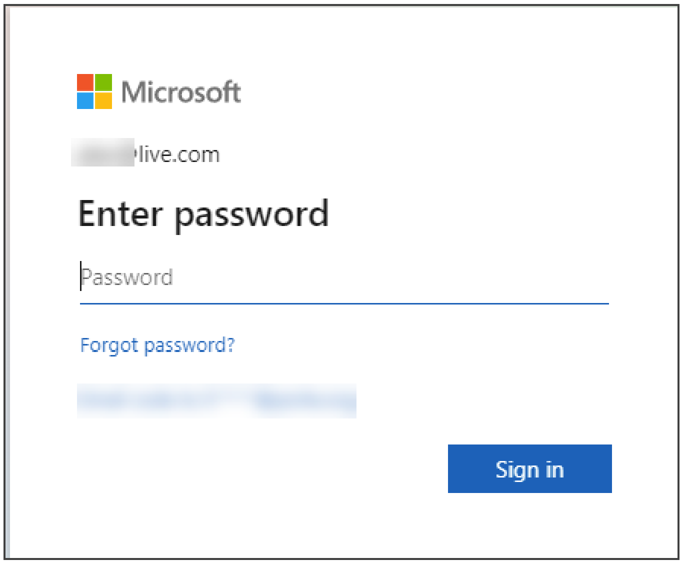
6) Click on the **Grant Access** button to the right of the Mail Server Type as shown in the below screen.



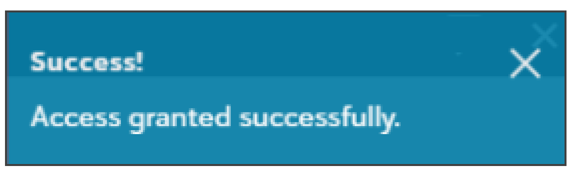
7) Now, you will see the Microsoft login prompt. Enter your eMail address and click on **Next** to proceed.



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.

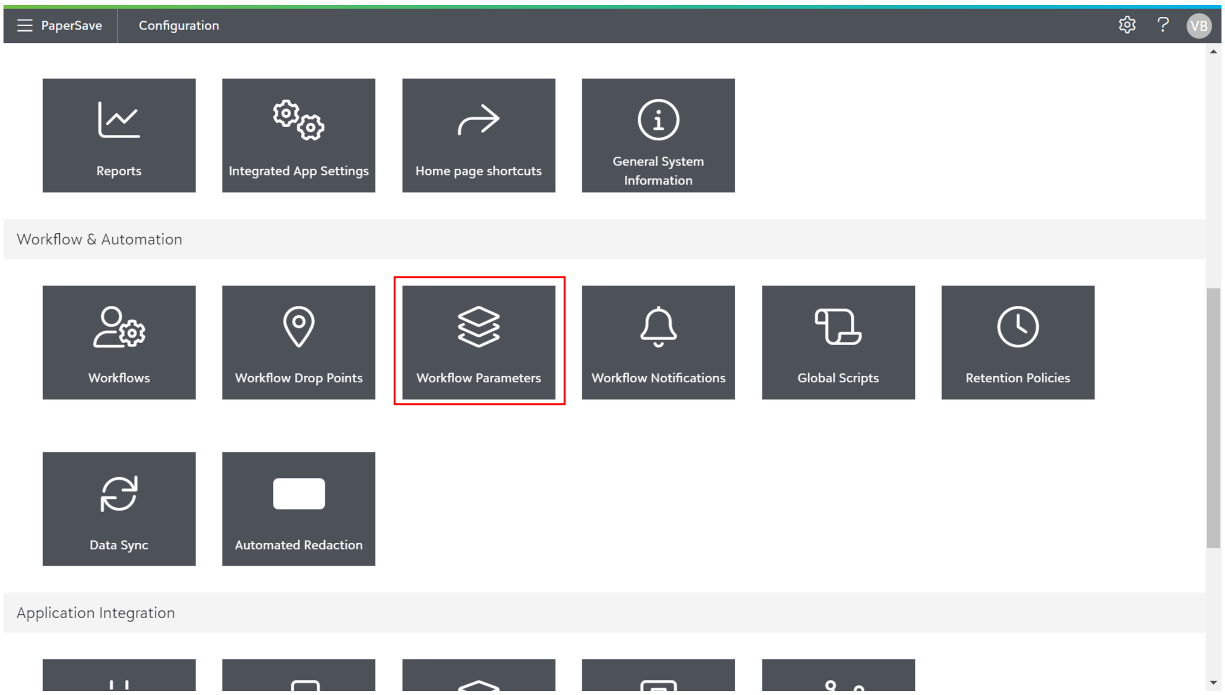
Note: The smaller the DPI number, the less sharp the image appears. However, size of the image increases as you increase the DPI number. We recommend that you use 300 DPI.

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:

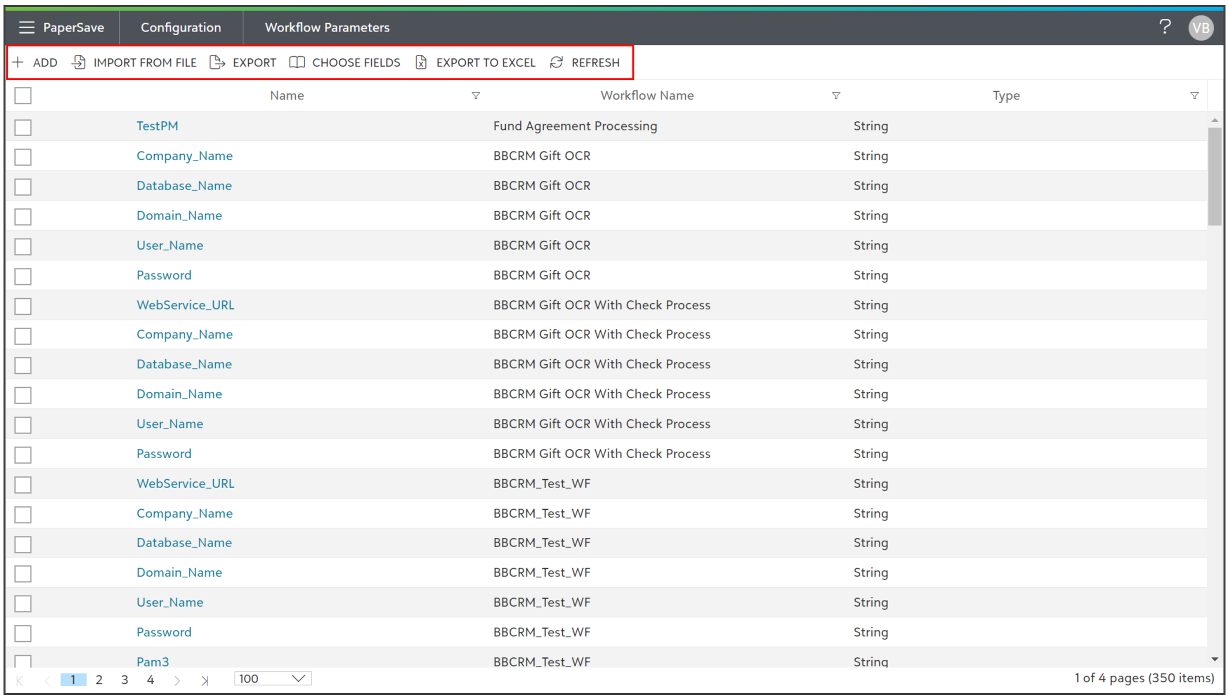
- Set default value for Workflow **(Global default for Workflow)**
- Set default value for each Workflow Step **(Workflow stepwise default)**
- Set the default value for Workflow User for a Workflow Step **(Workflow stepwise default for Workflow user)**

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



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.

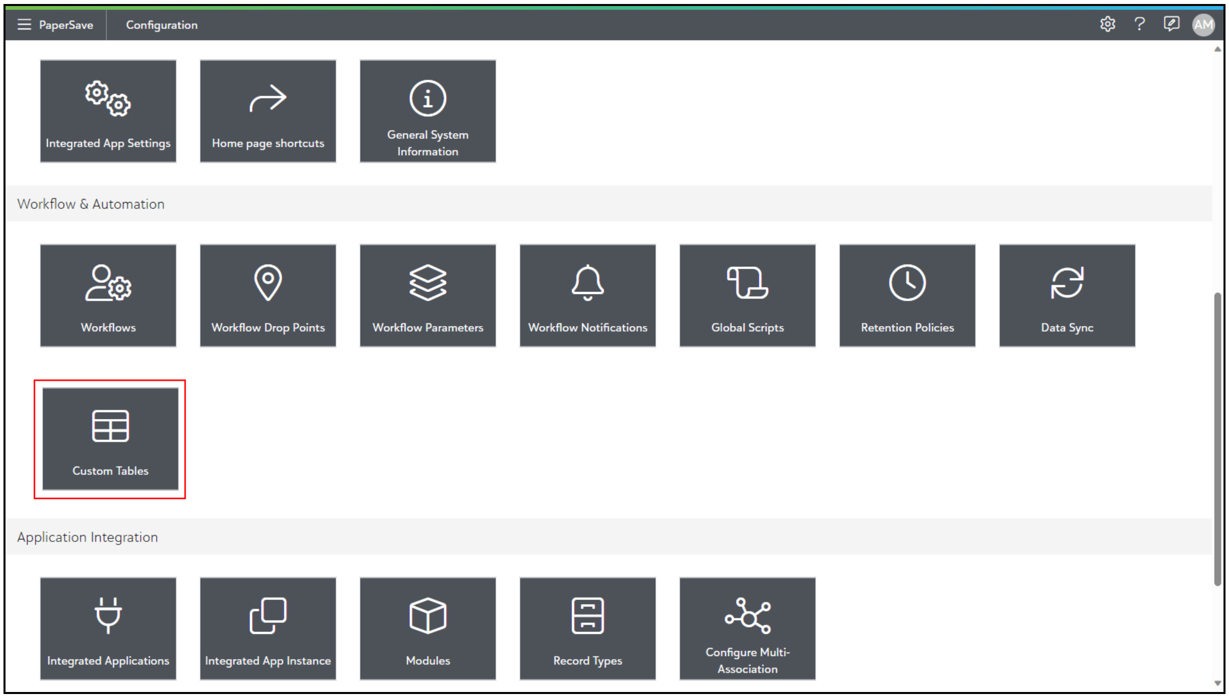
Managing Cloud Data Sync

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**.



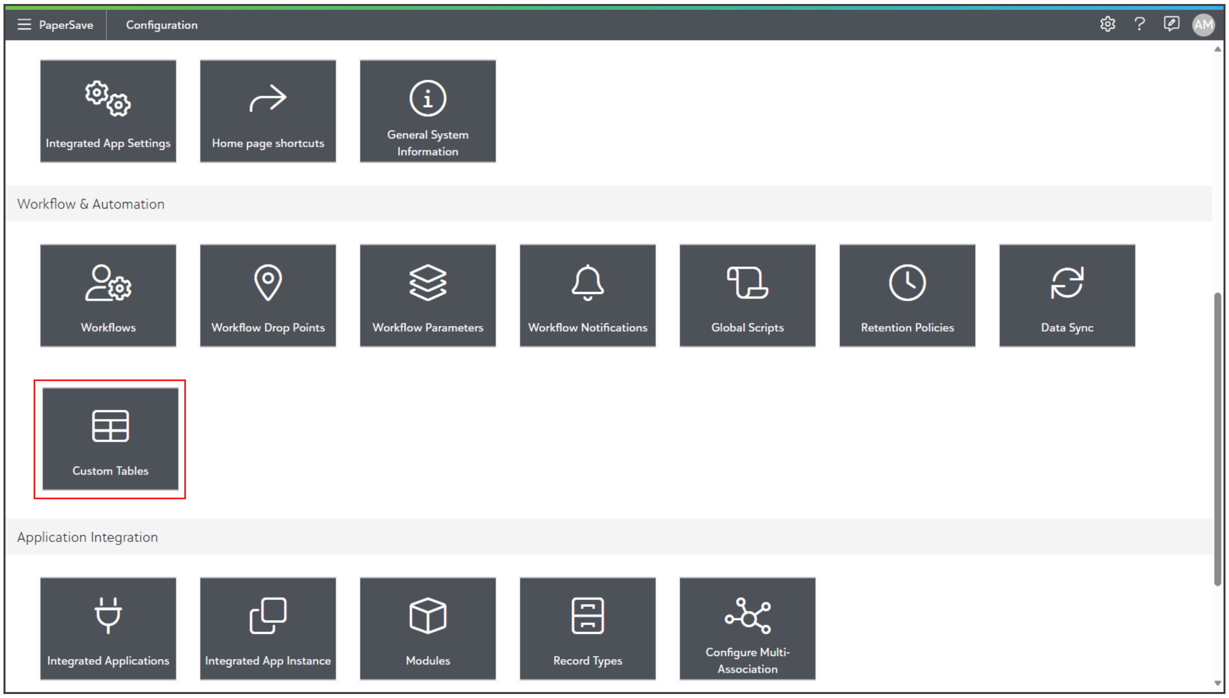
The following topics are covered in the Custom Tables section:

- Creating the Custom Tables
- Managing the Custom Tables
- Deleting the Custom Tables

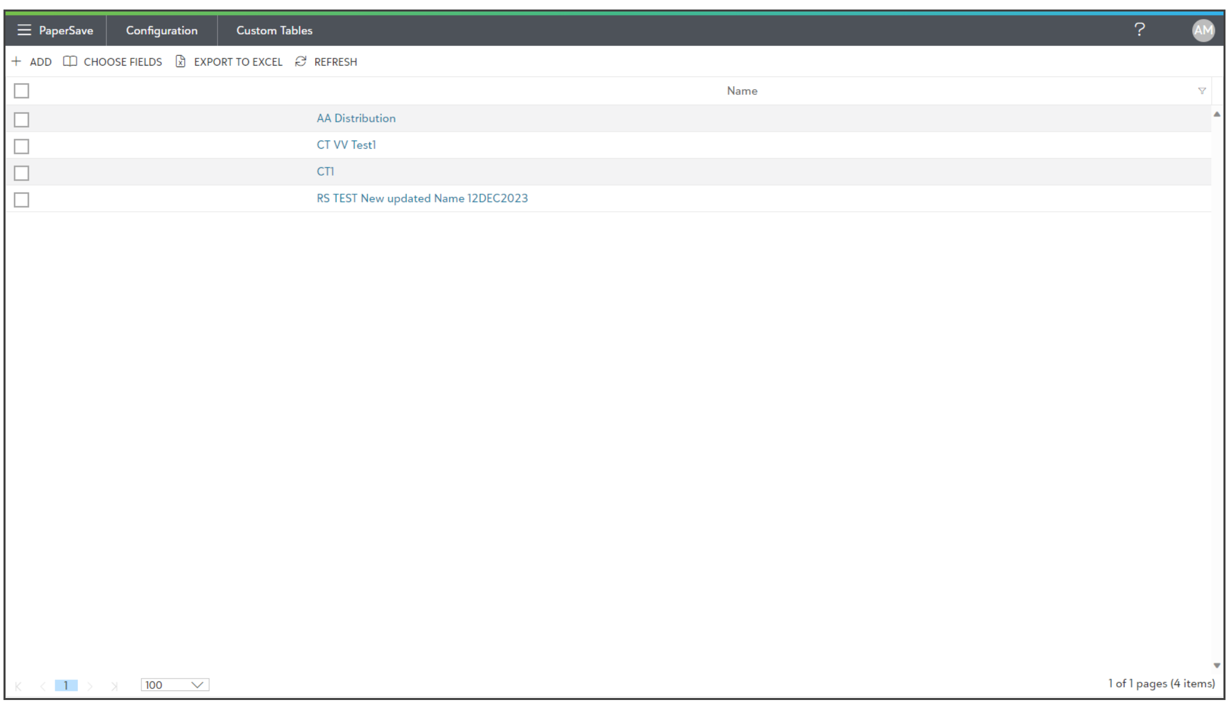
Creating the Custom Tables

Follow the below steps to create a Custom Table:

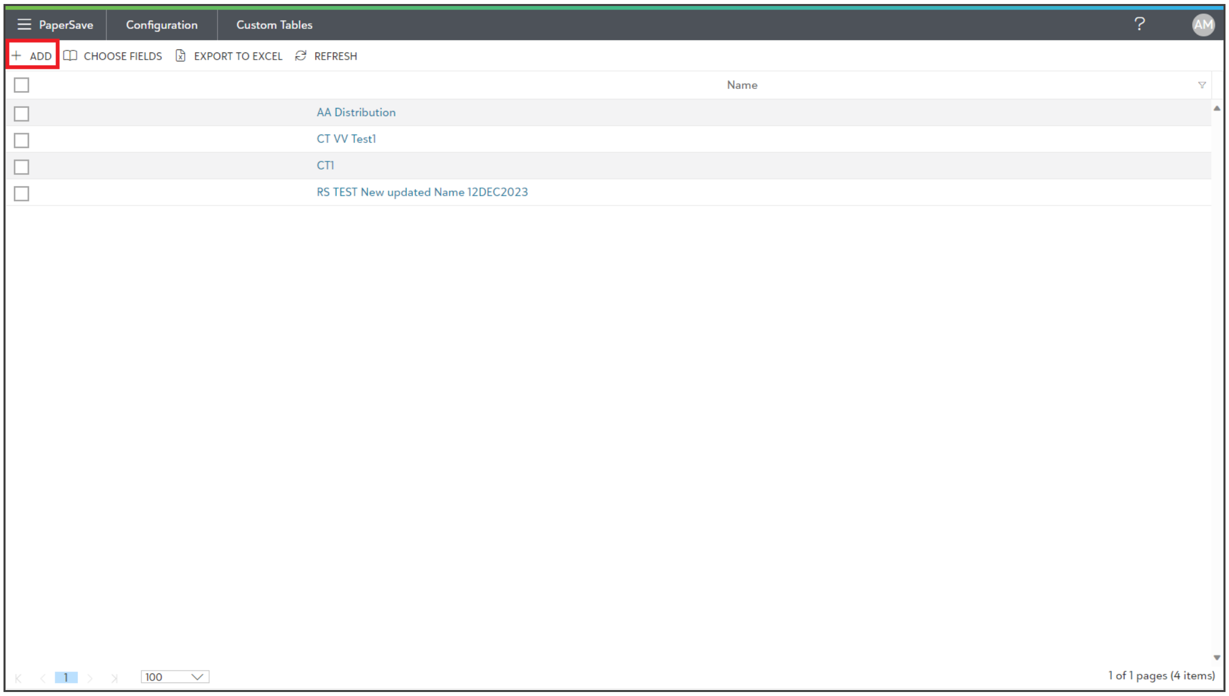
1) Click on the Custom Tables tile in the **Workflow and Automation** section of the **Configuration Area**.



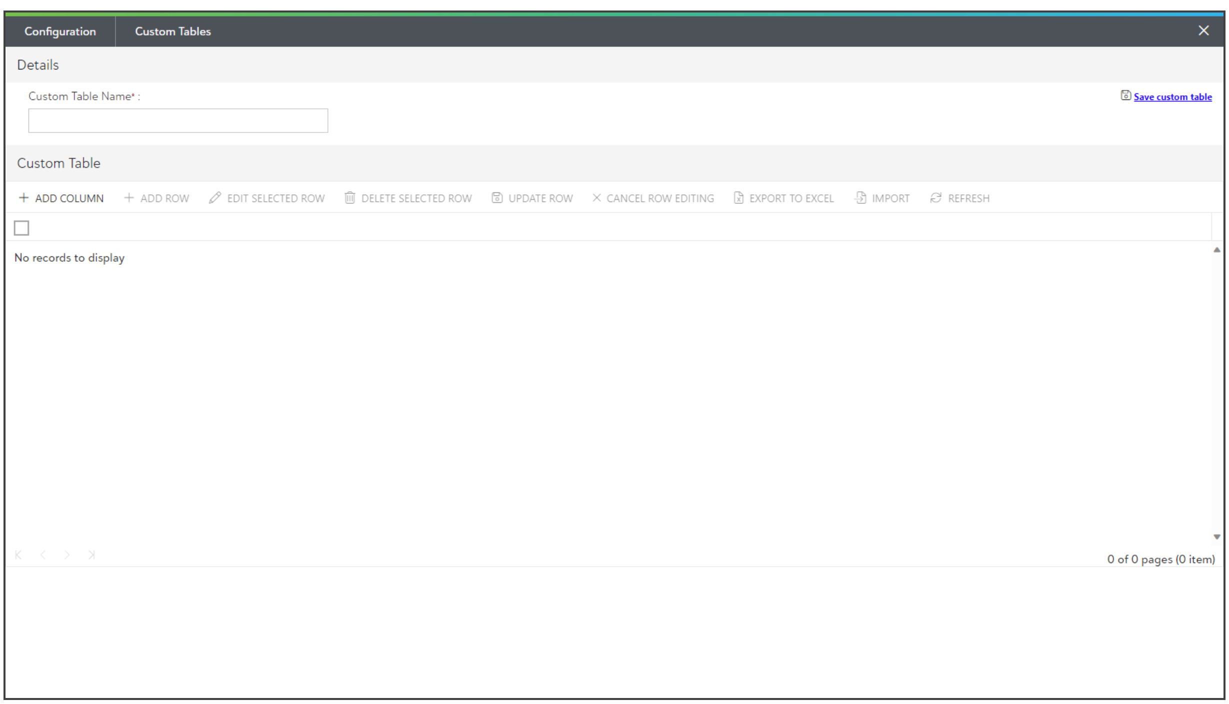
2) Now, the Custom Tables list view page opens.



3) Click on the **+ADD** option from the list toolbar, as shown in the below screen.

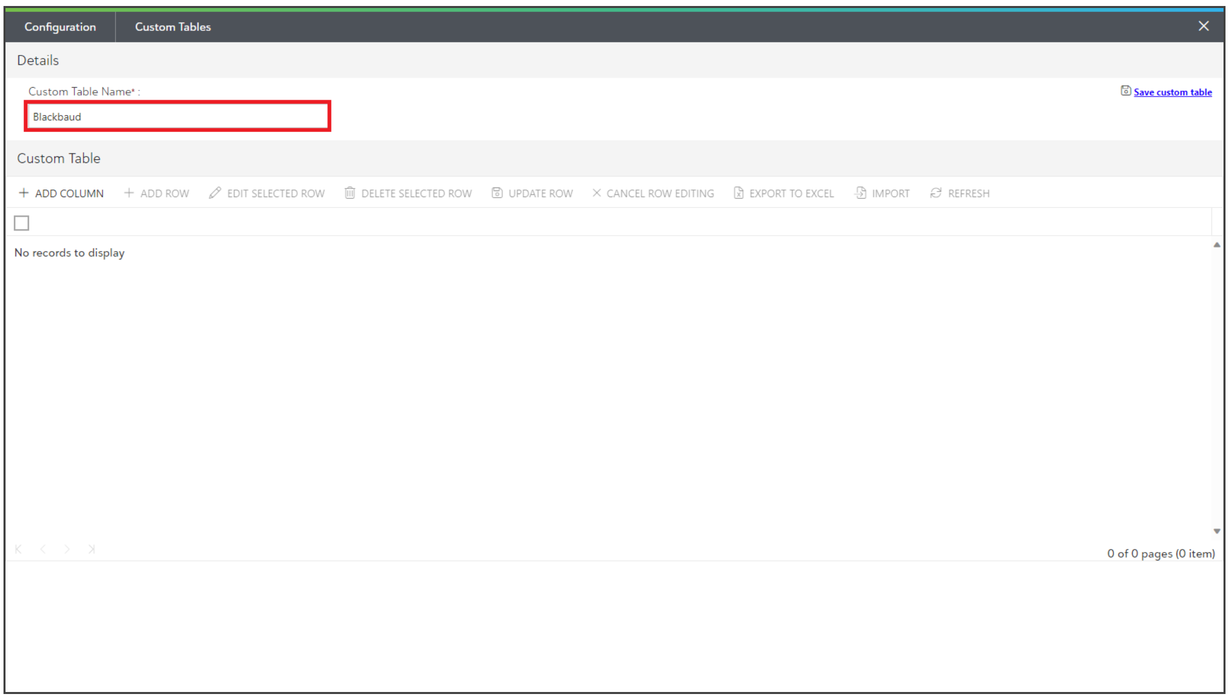


4) The Custom Table full-page dialogue opens as shown below.

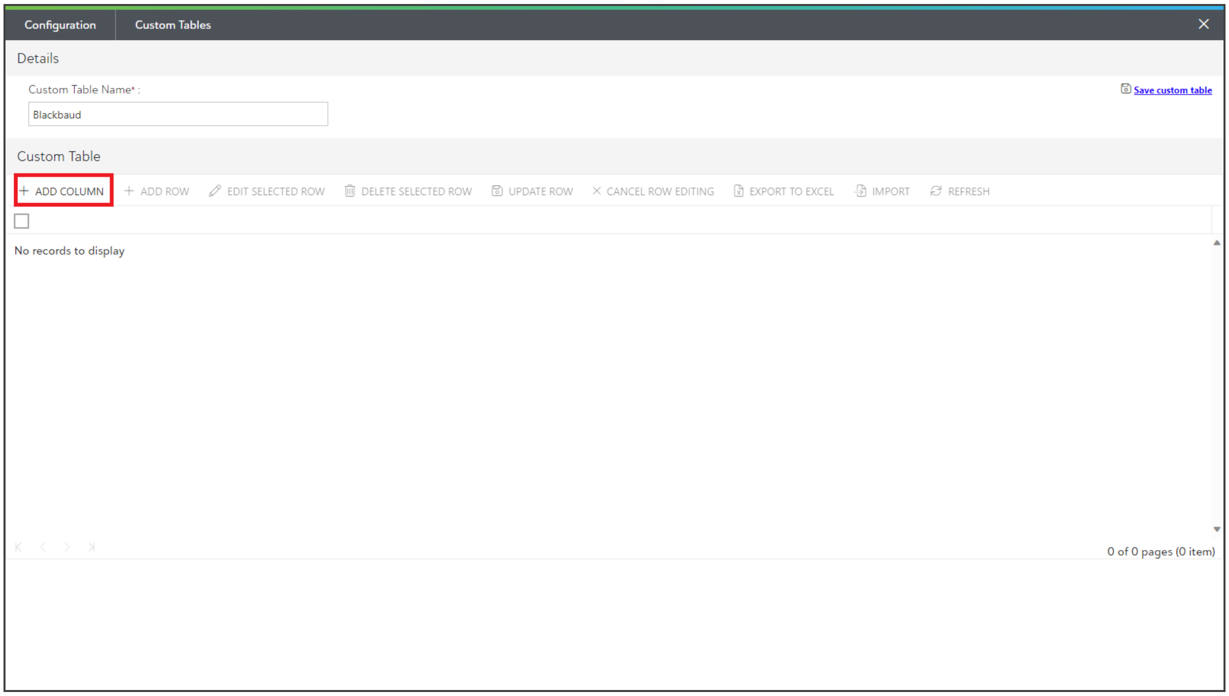


5) Enter the valid name in the **Custom Table Name** field.

> **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.

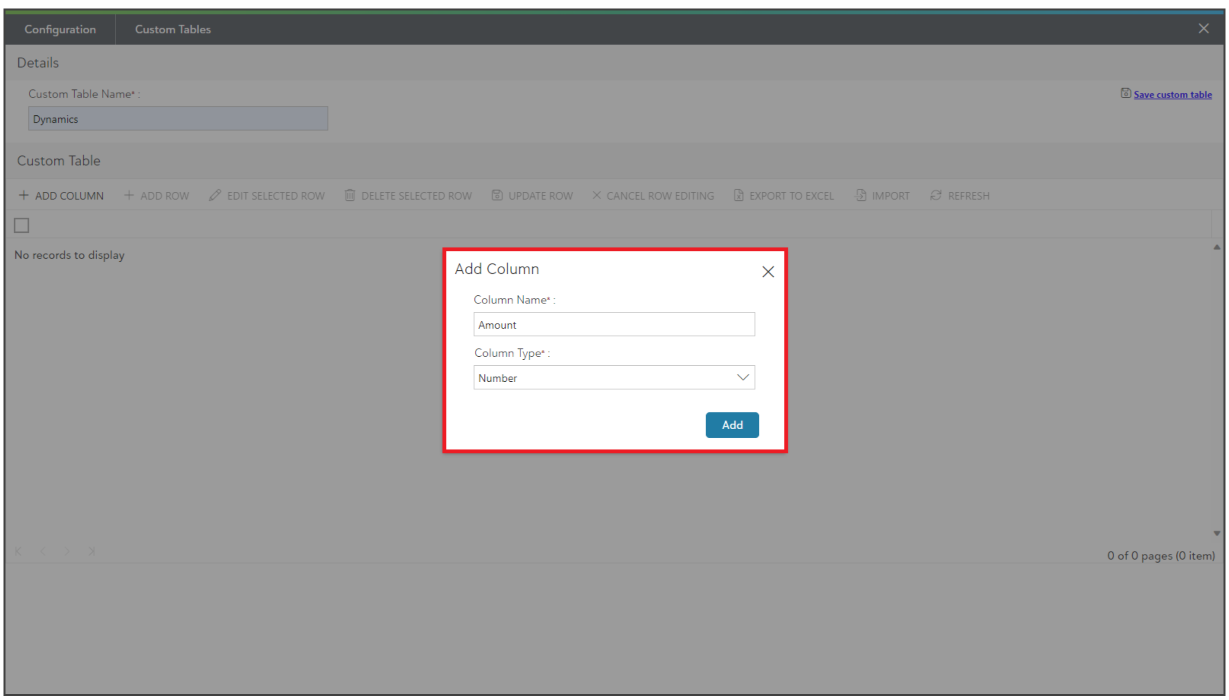
> **Note:** The number column type allows only 13 values including with four decimal values.

- **Date:** Select "Date" if you want to keep the type as a date field.

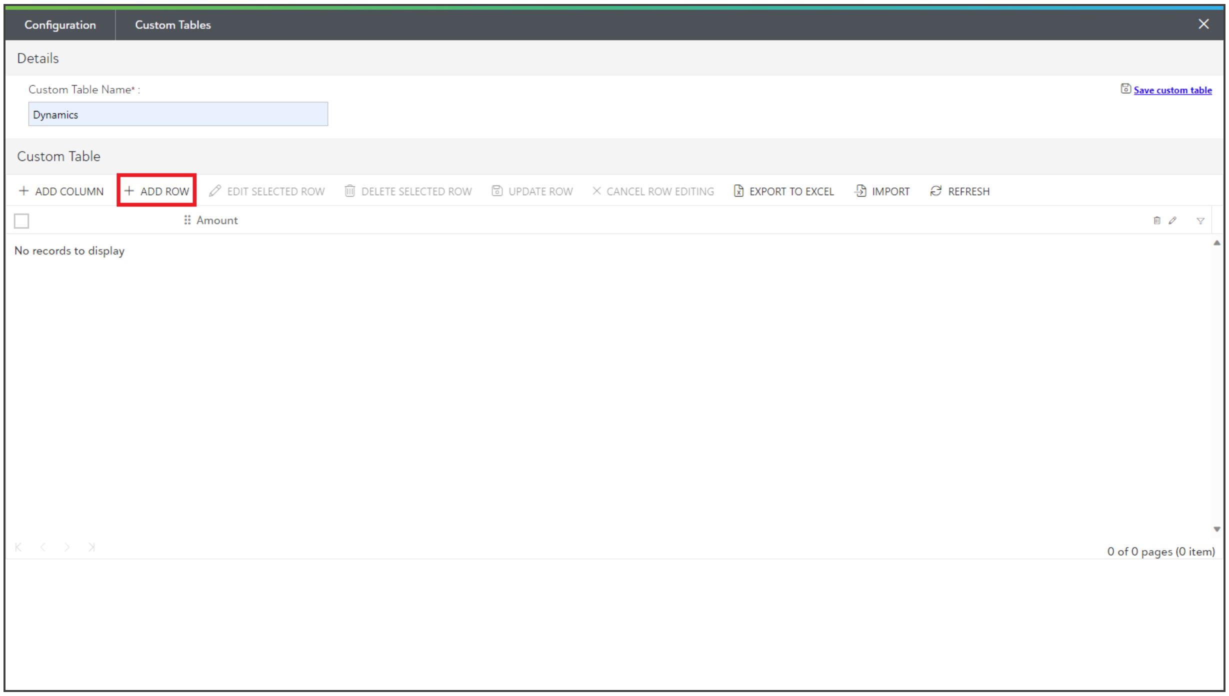
> **Note:** The format of the date is displayed as per the format you have set.

- **Users:** Select "Users" if you want to keep the type as User from the drop-down list.

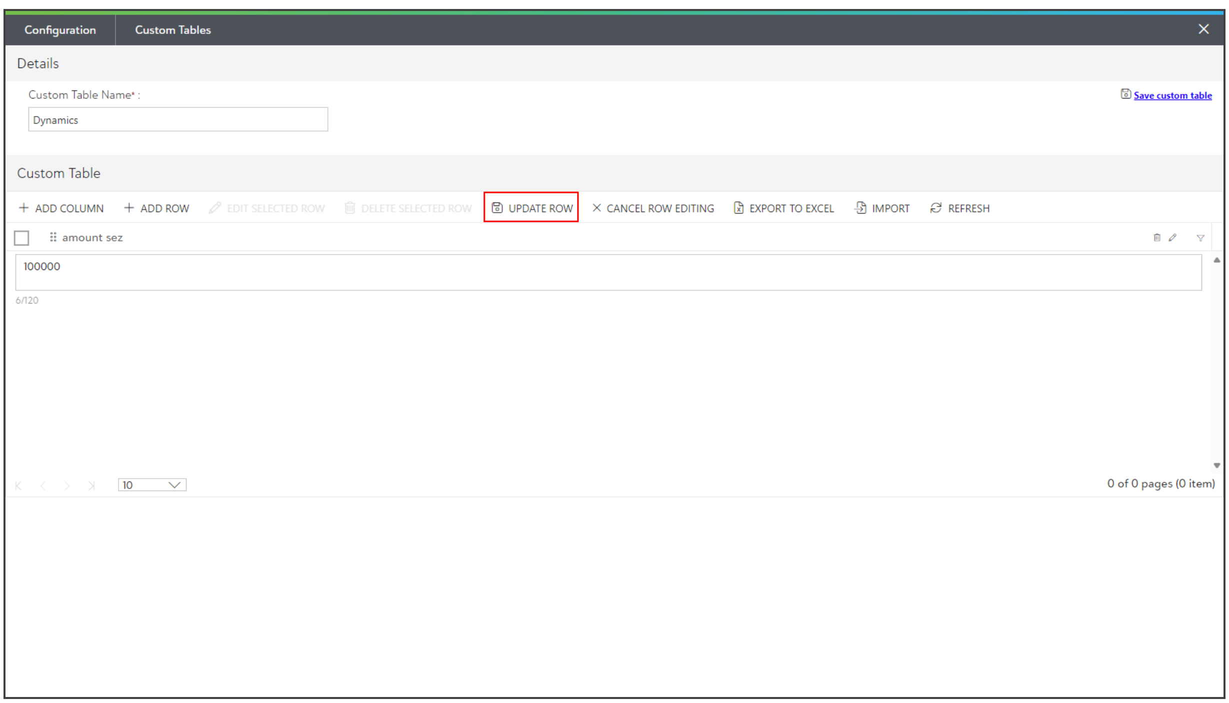
> **Note:** If you keep any column blank while adding the row, then it stores the values as Null in the database for that row in that column.



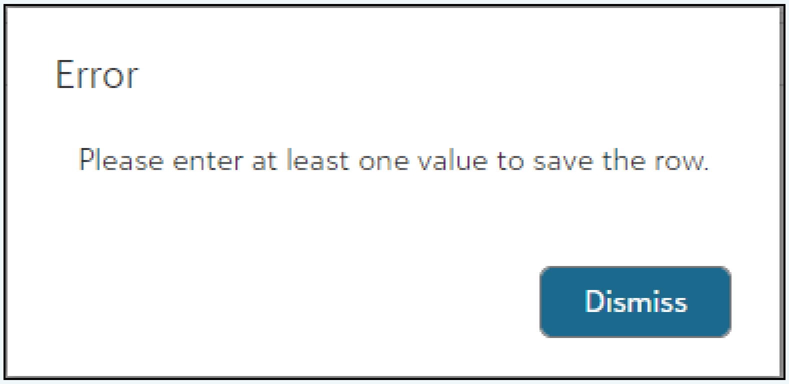
8) Click on the **+ ADD ROW** option from the list toolbar, as shown in the below screen.



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.

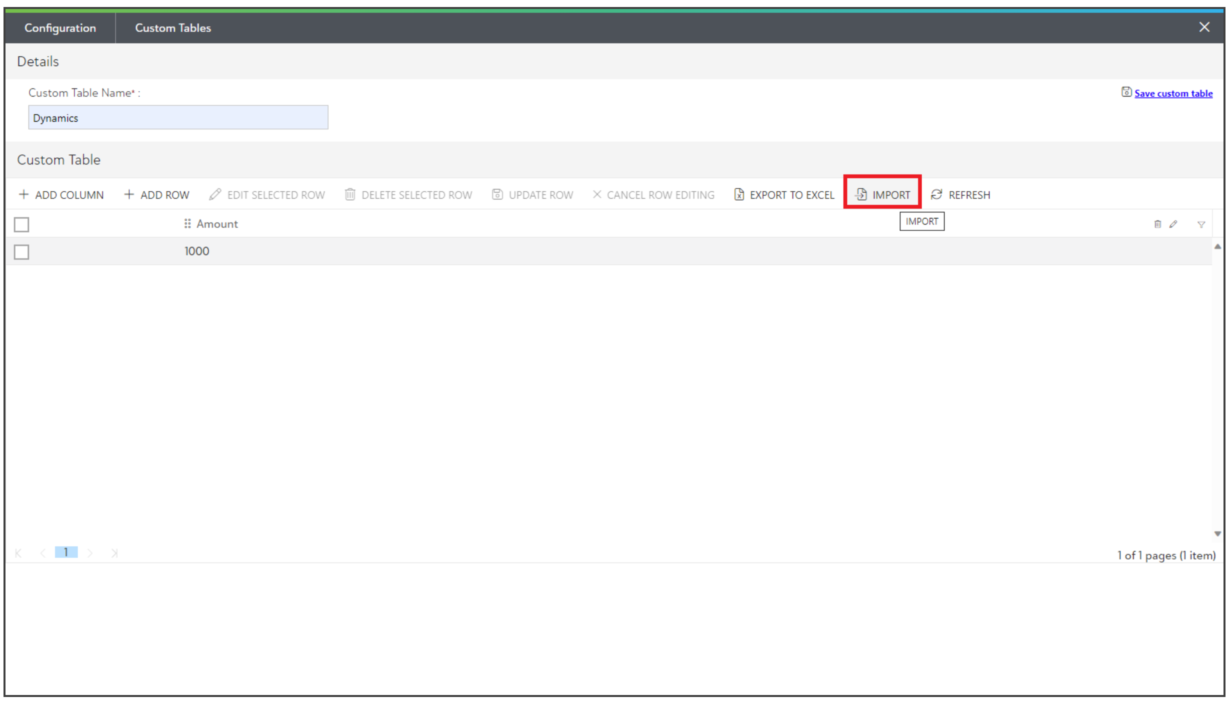


Note: If you try to save the blank row, a notification appears on the screen as shown below.



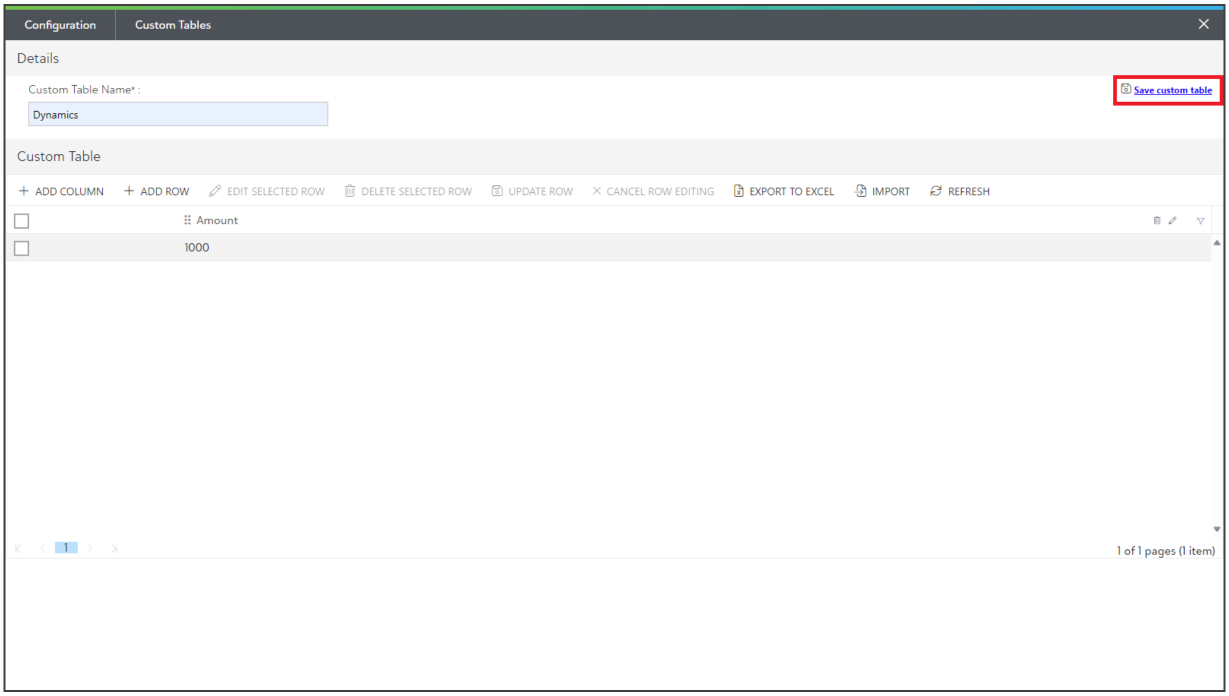
10) To add more number of rows, you can import rows by clicking the **IMPORT** option from the list toolbar.

Note: The import option is enabled only, when at least a single column is defined in a Custom Table.

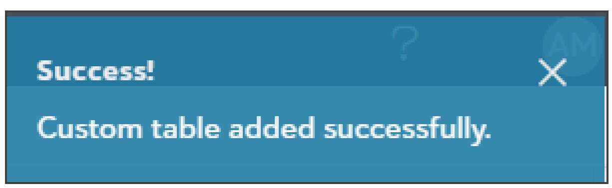


Note: The import option allows you to import the data from the .CSV file. Refer to this page to learn more.

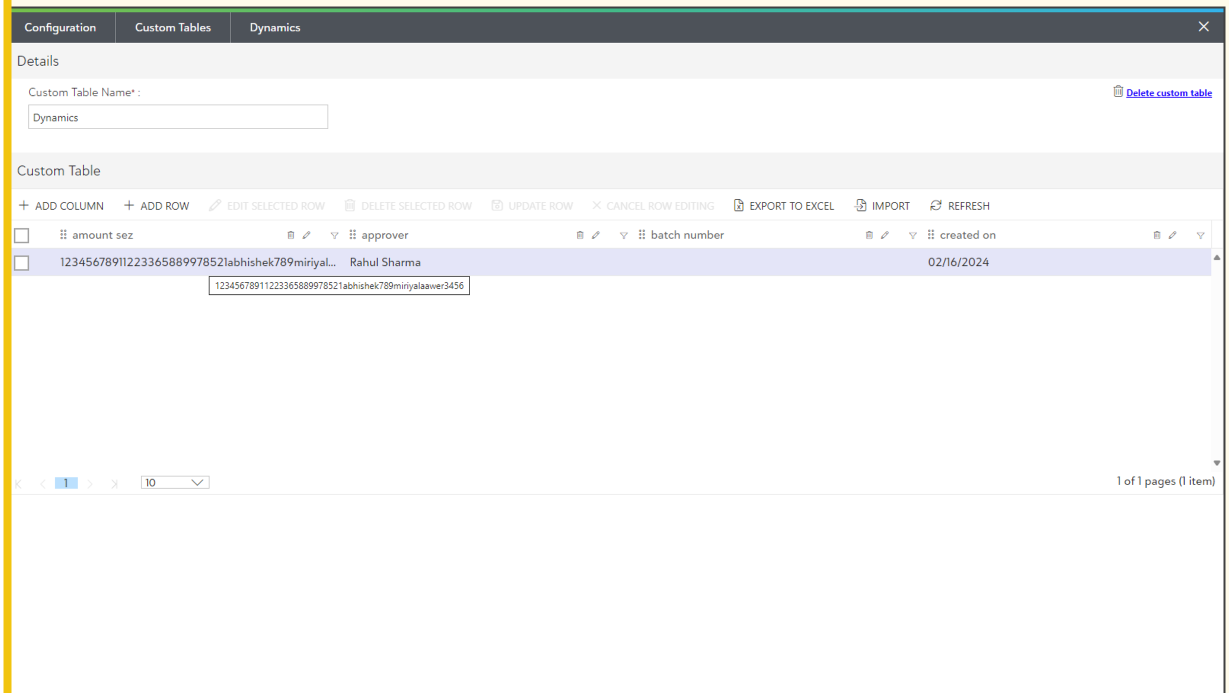
11) Now, click on the **Save Custom Table** as shown below.



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

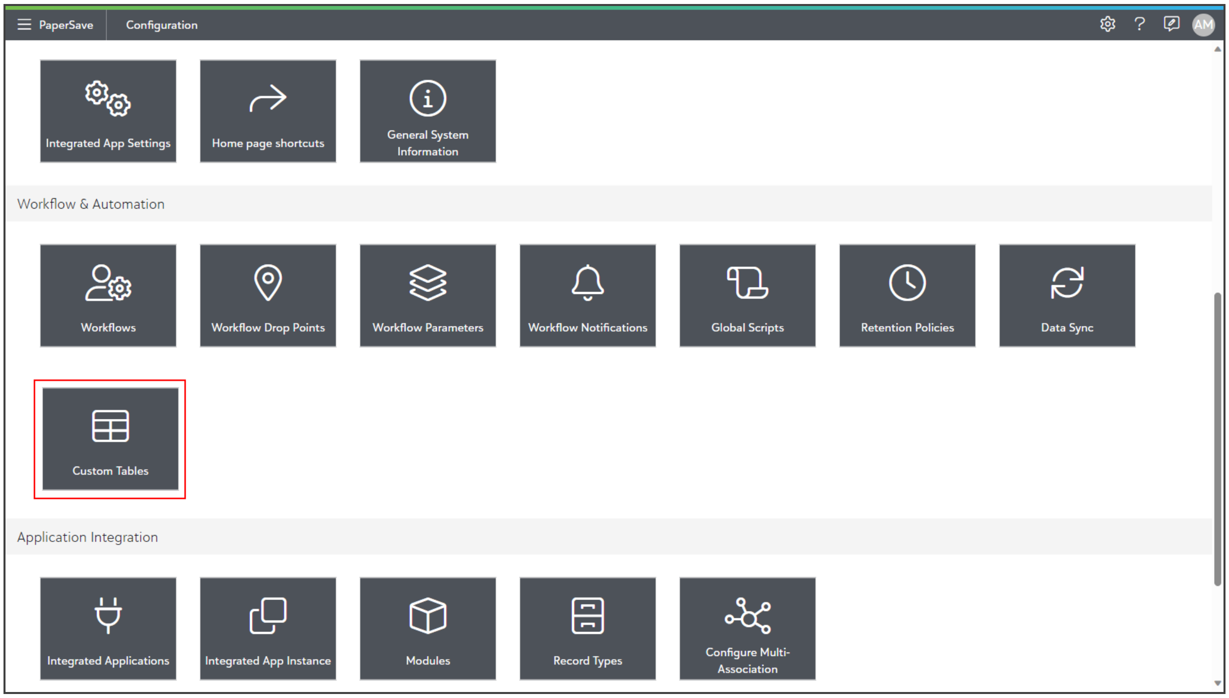
The following topics are covered in Managing the Custom Tables:

- Editing the columns and rows within the Custom Tables.
- Deleting the columns and rows within the Custom Tables.

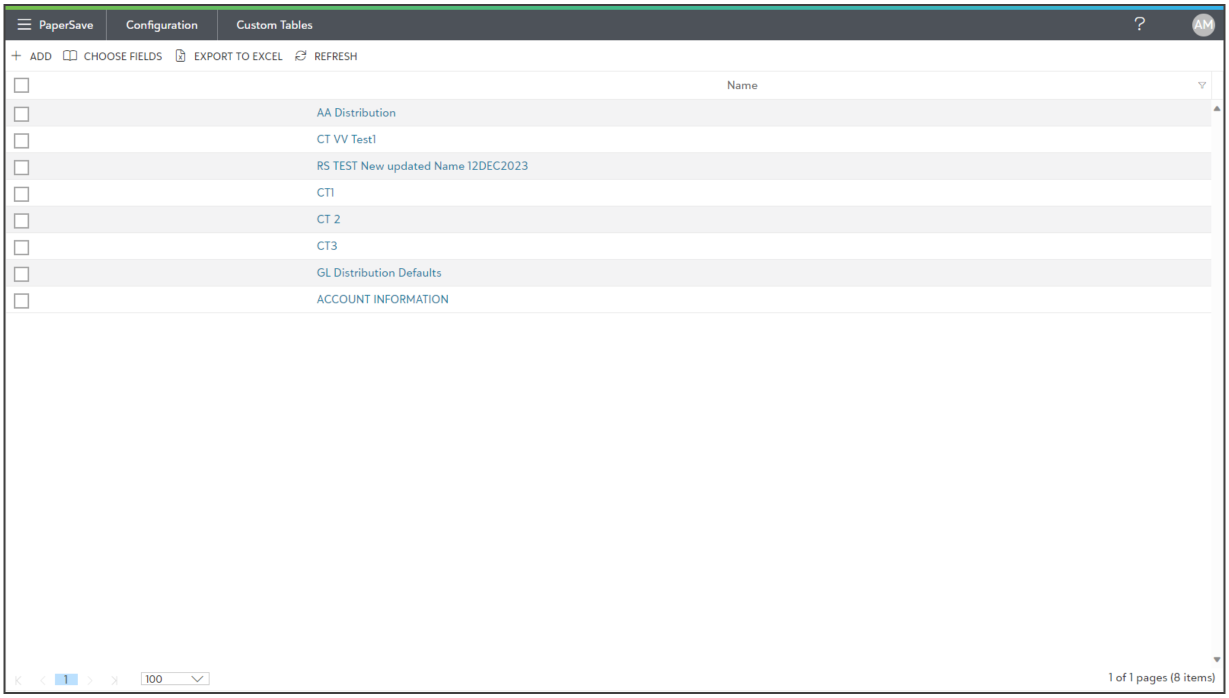
Editing the columns and rows within the Custom Tables

Follow the below steps to edit the column and rows within the Custom Table:

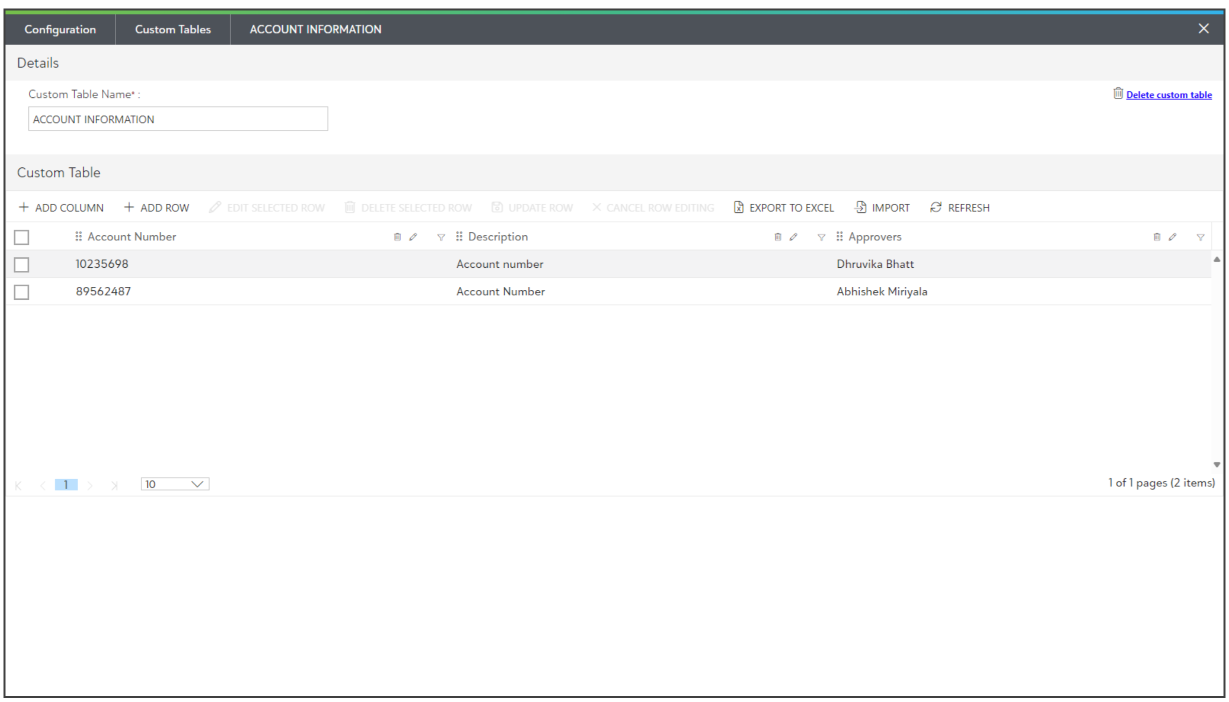
1) To edit the columns and rows within the Custom Table, click on the **Custom Tables** tile in the **Workflow and Automation** section of the **Configuration Area**.



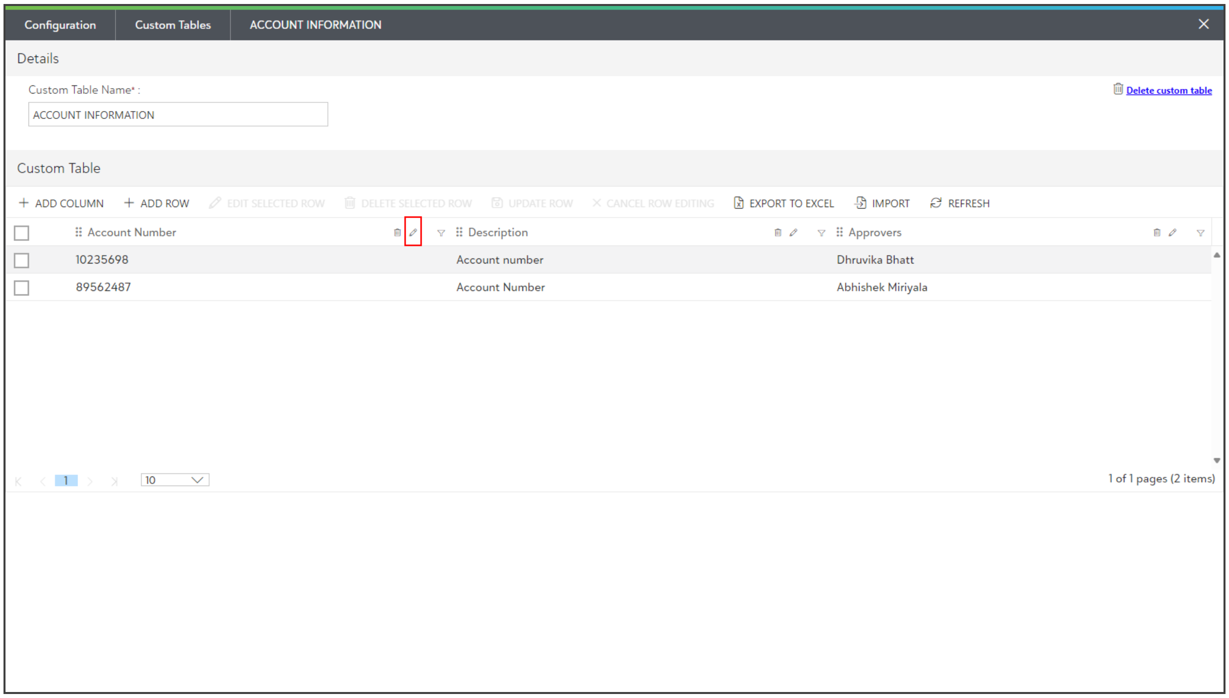
2) Now, the Custom Tables list view page opens. Now, click on the desired custom table from the list below.



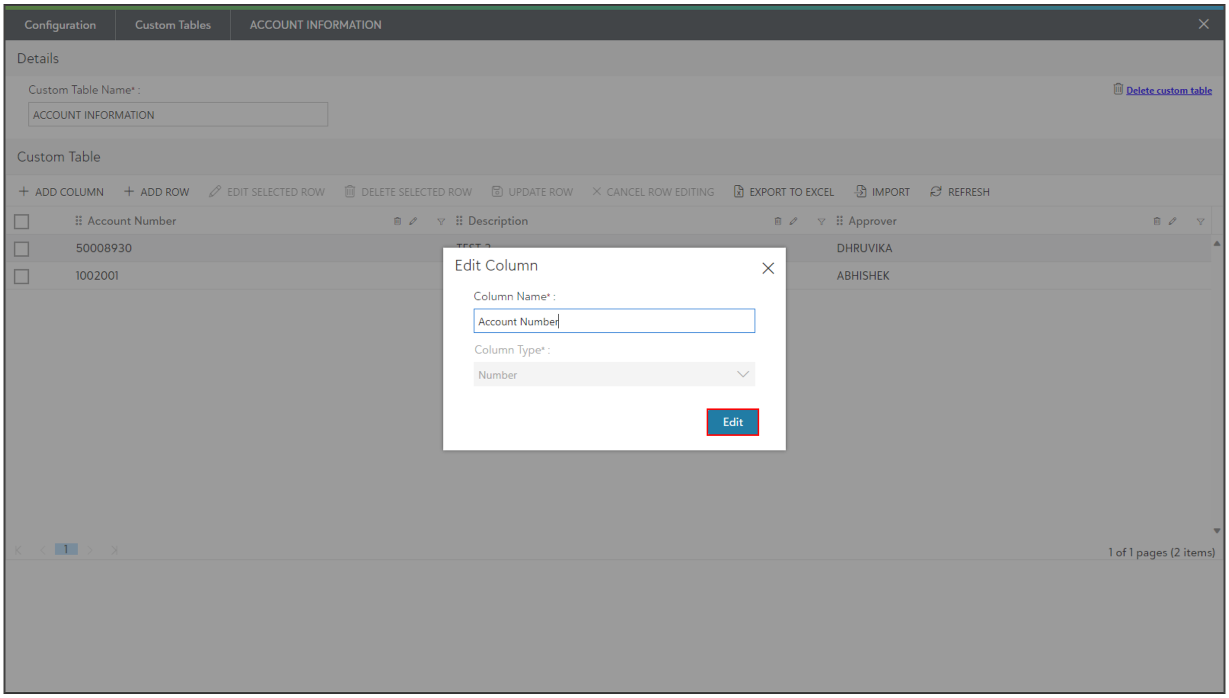
3) The Custom Tables full-page dialog appears as shown below.



4) You can also change the Custom table name if you want. To edit the columns, click on the Edit icon as shown below.

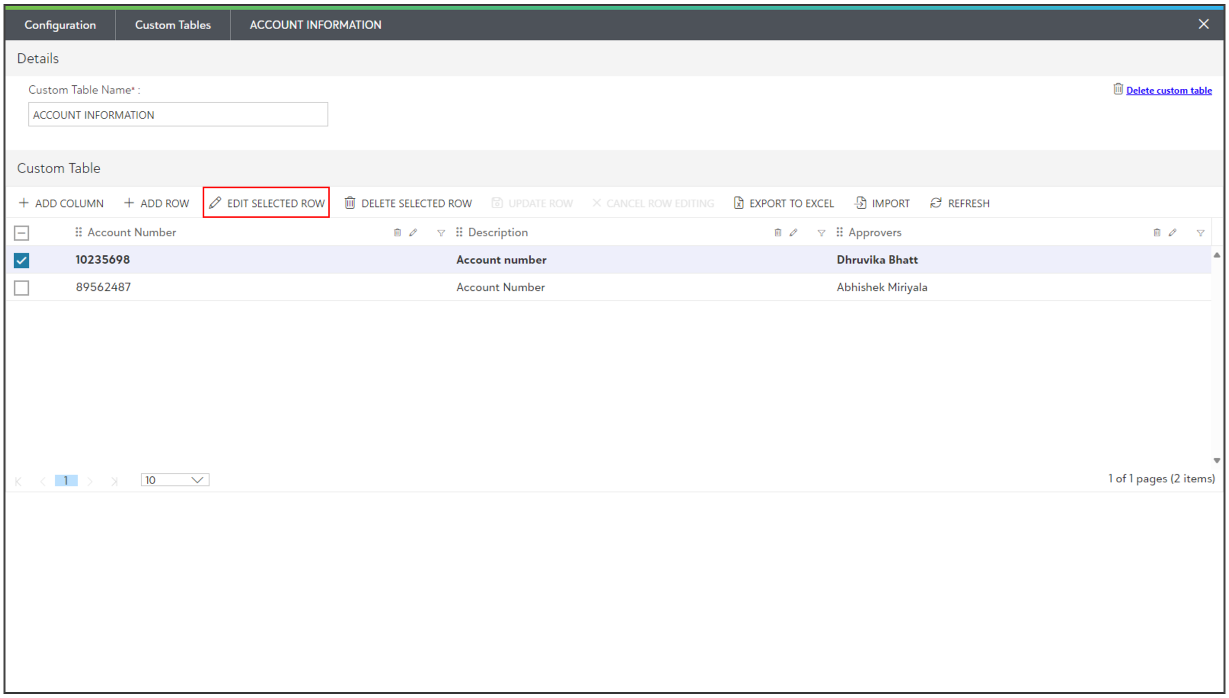


5) Now the column opens in an edit mode, you can make necessary changes as needed and click on the **EDIT** button to save the changes.

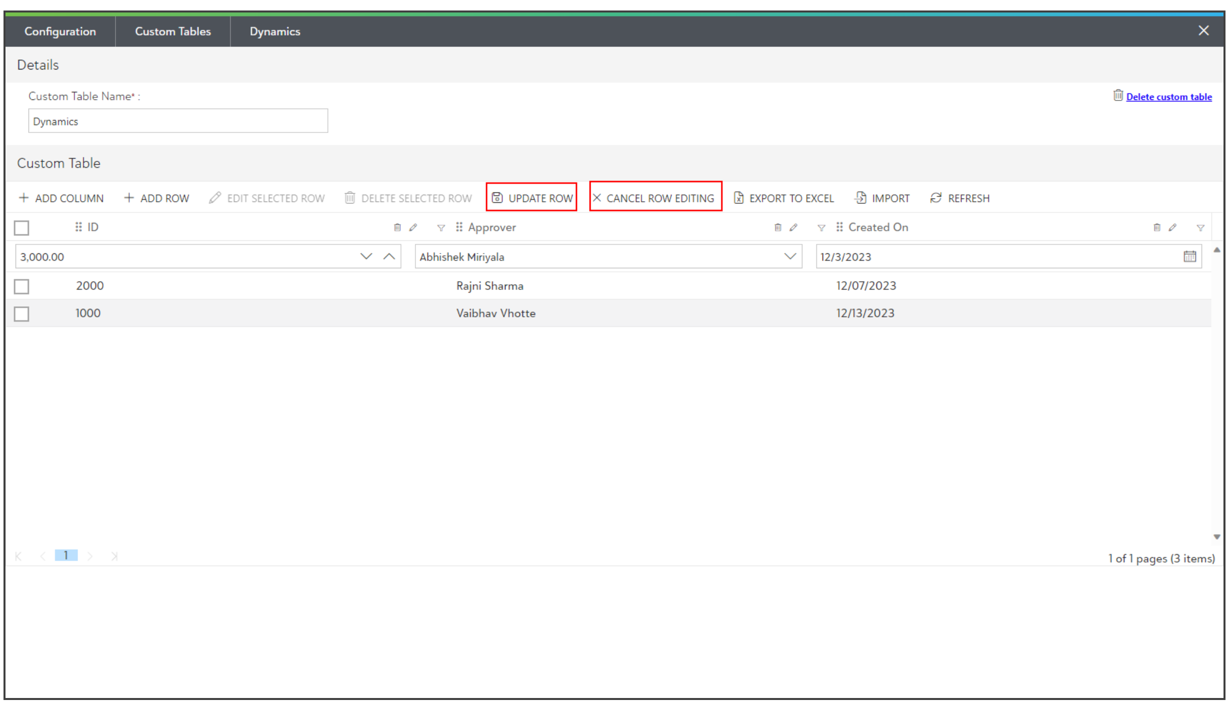


> **Note:** The **Column Type** drop-down option can be edited only when there are no row values under the selected Column Type.

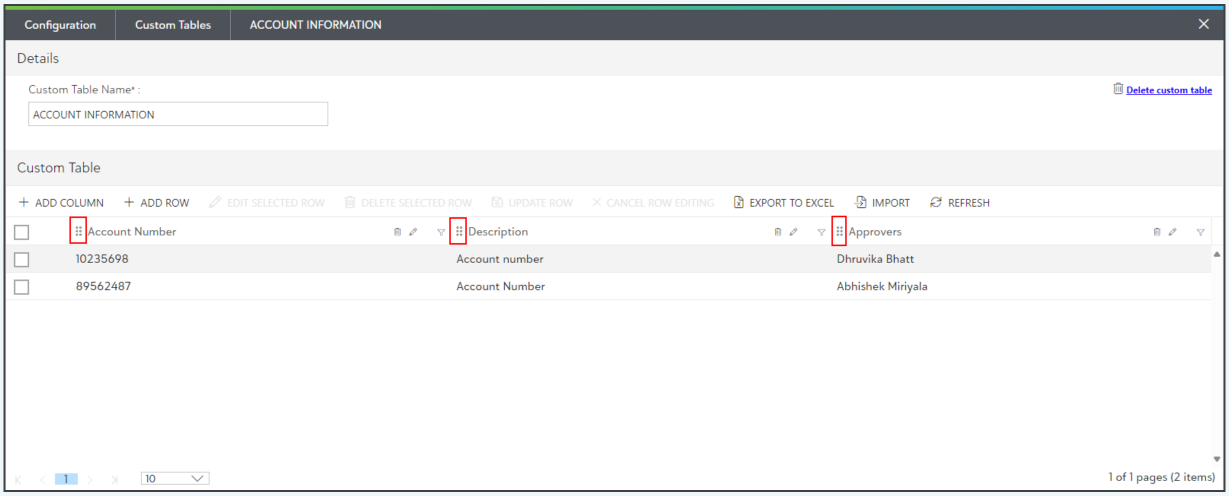
6) Select the row and click on the **EDIT SELECTED ROW** option from the list toolbar or double-click on the row to open it in edit mode.



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.



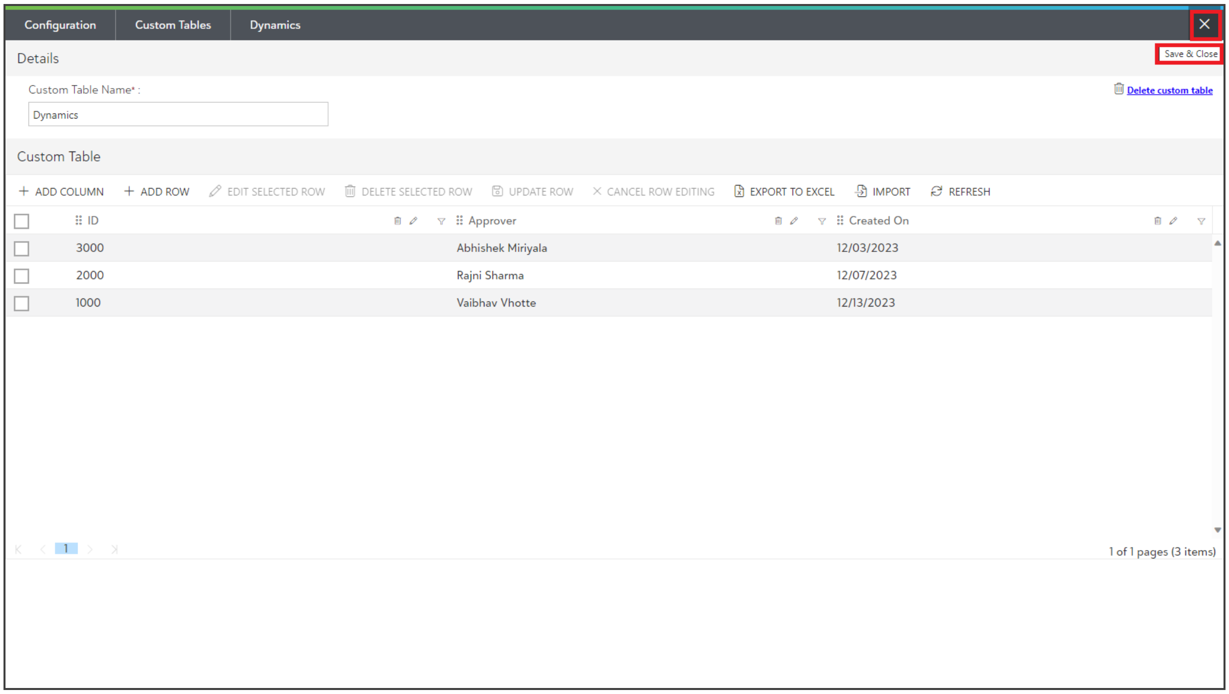
Note: To rearrange the order of the columns within the Custom table, you can simply drag them to the desired position in the table as shown below.



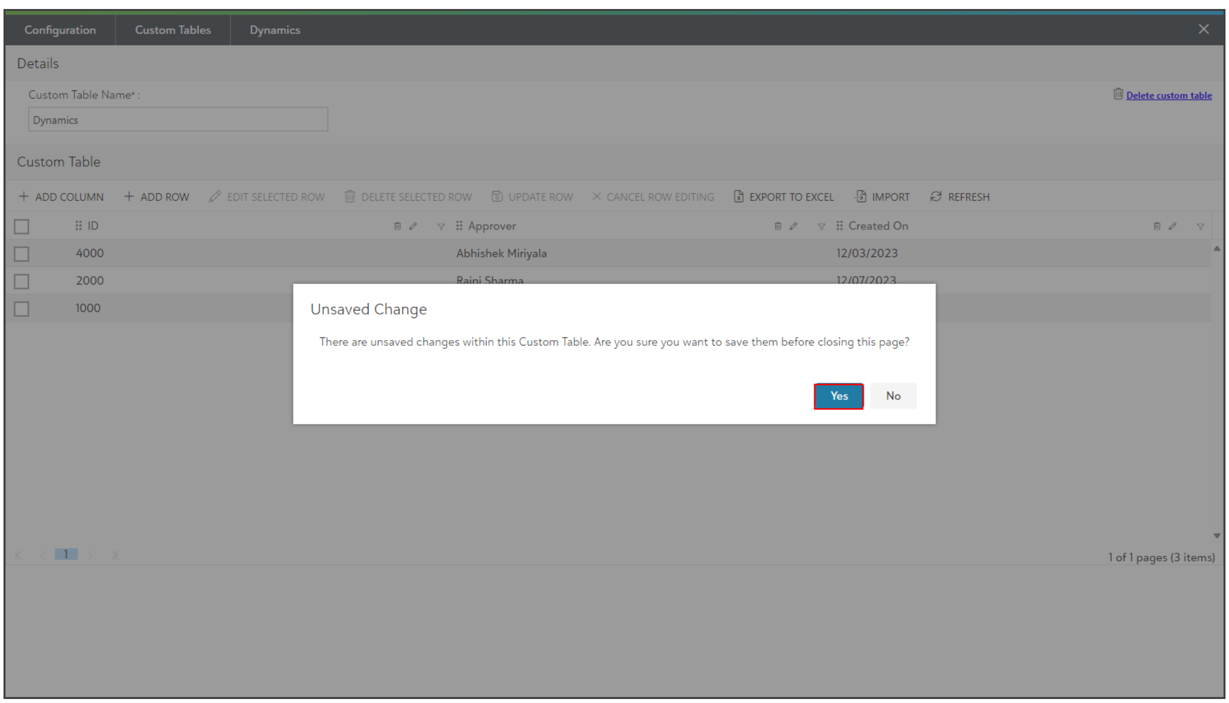
8) To add more number of rows within the Custom table, click here to learn how to import the Rows using the **Import** button from the list toolbar.

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.

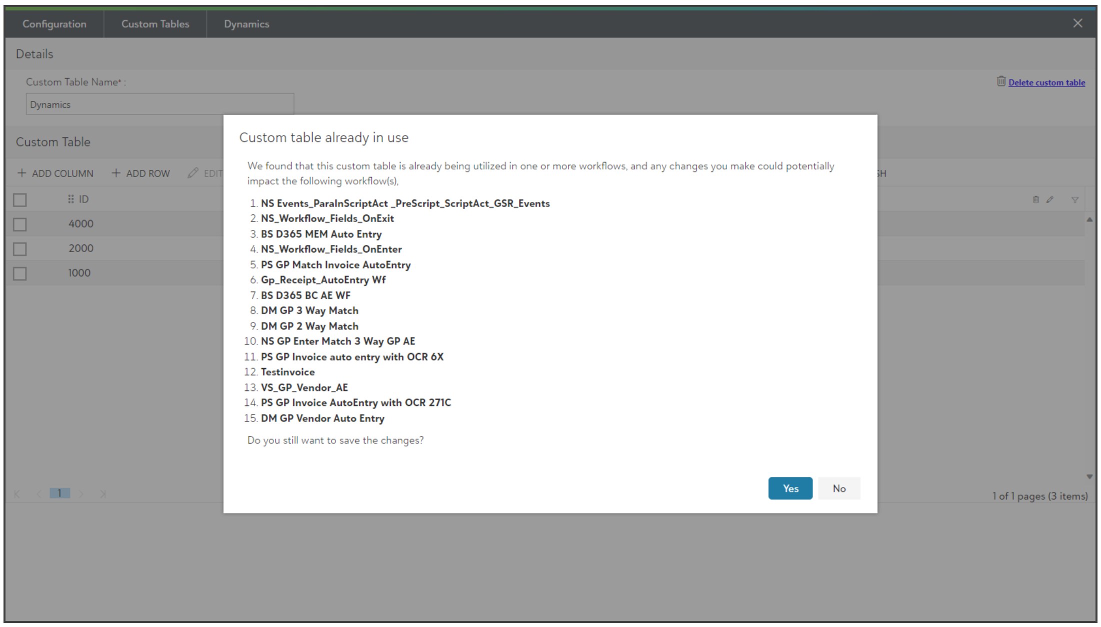


10) A notification “Unsaved Change “pops up on the screen, click Yes option to save the changes as shown below.

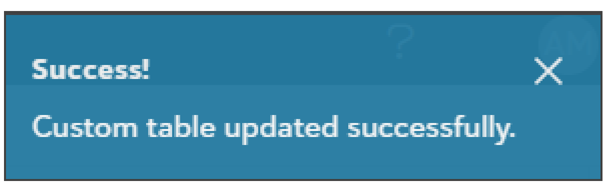


11) Now, it validates whether the custom table is used within any workflow or not. Refer to steps 11(a) and 11 (b).

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

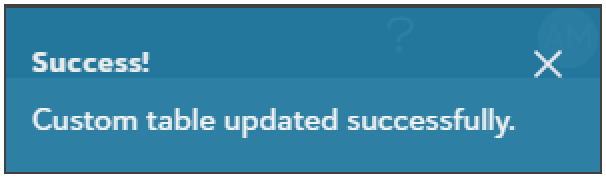


- If you click on the **Yes** option, a successful notification appears on the top-right corner of the screen and redirects to the Custom Tables list view page.



- If you click on the No option, the update operation gets cancelled and redirects to the Custom Tables list view page.

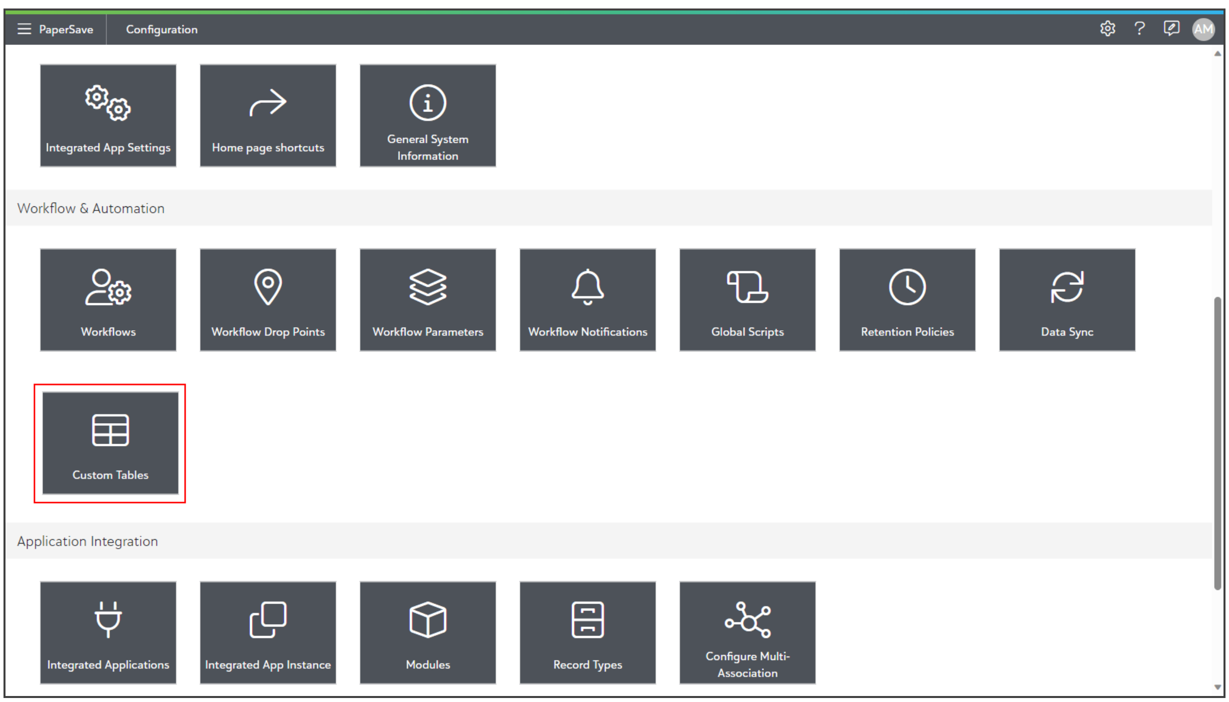
11(b) If the Custom table is not used in any of the Workflows, a successful notification appears on the top-right corner of the screen and redirects to the Custom Tables list view page.



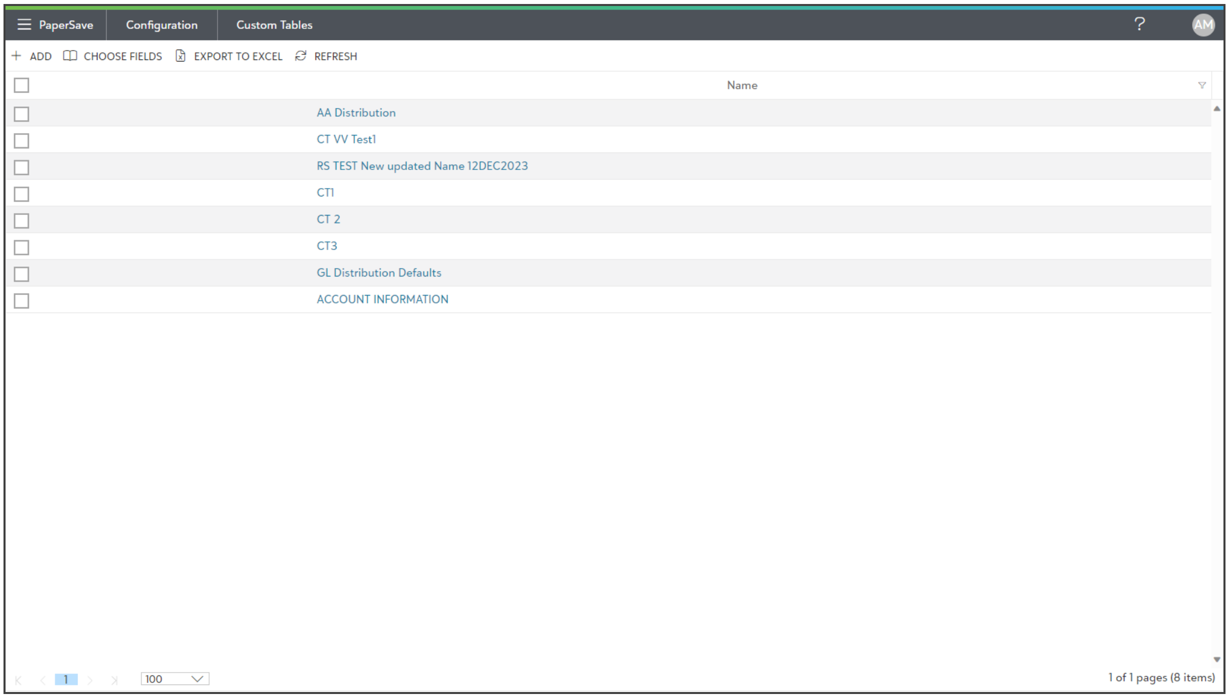
Deleting the columns and rows within the Custom Tables

Follow the below steps to delete the column and rows within the Custom Table:

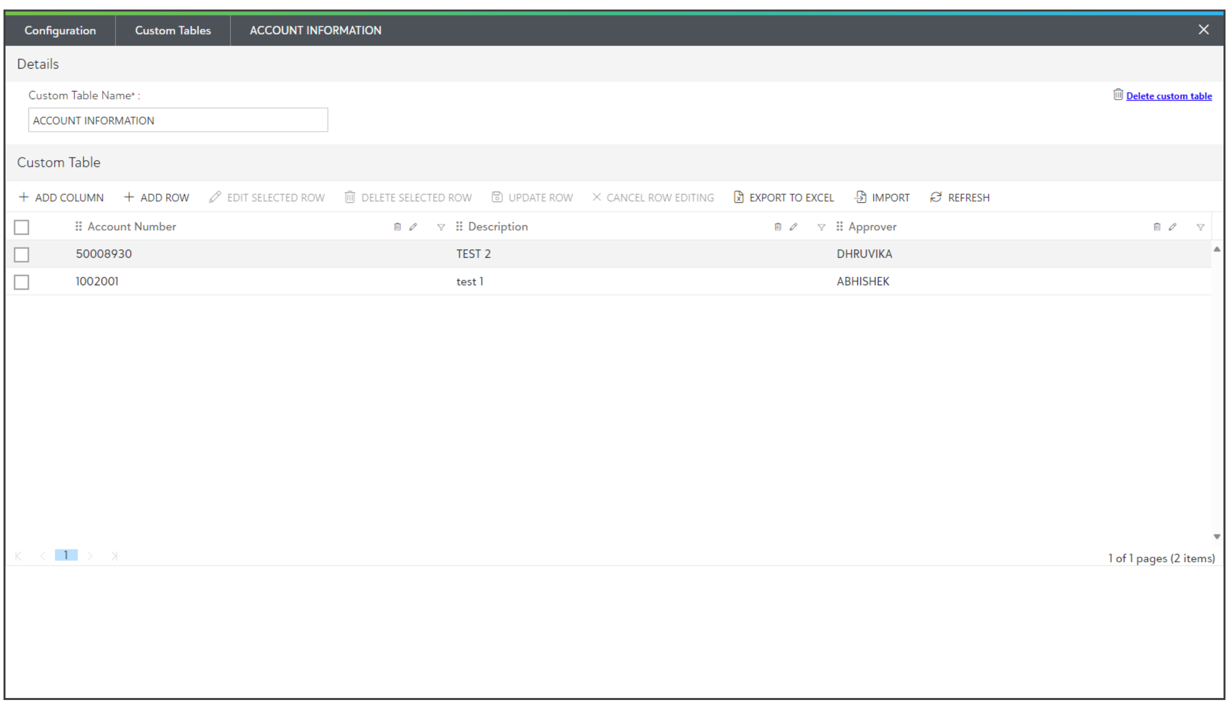
1) To delete the columns and rows within the Custom Table, click on the **Custom Tables** tile in the **Workflow and Automation** section of the **Configuration Area**.



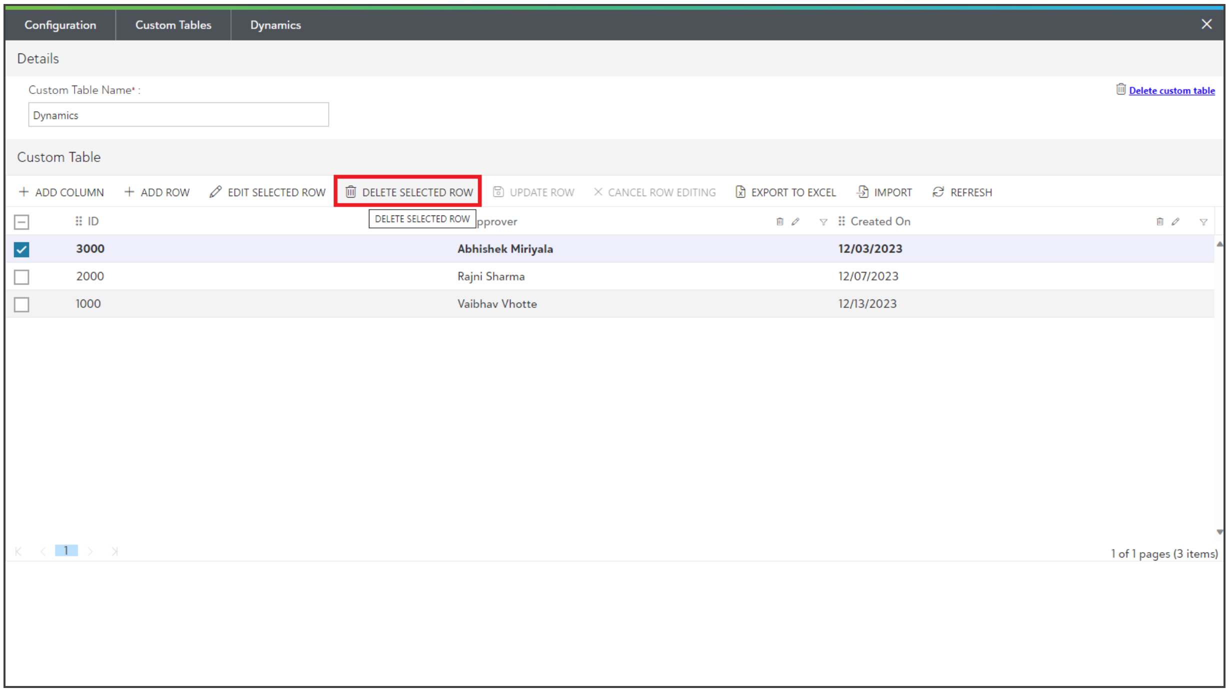
2) Now, the Custom Tables list view page opens. Now, click on the desired custom table from the list below.



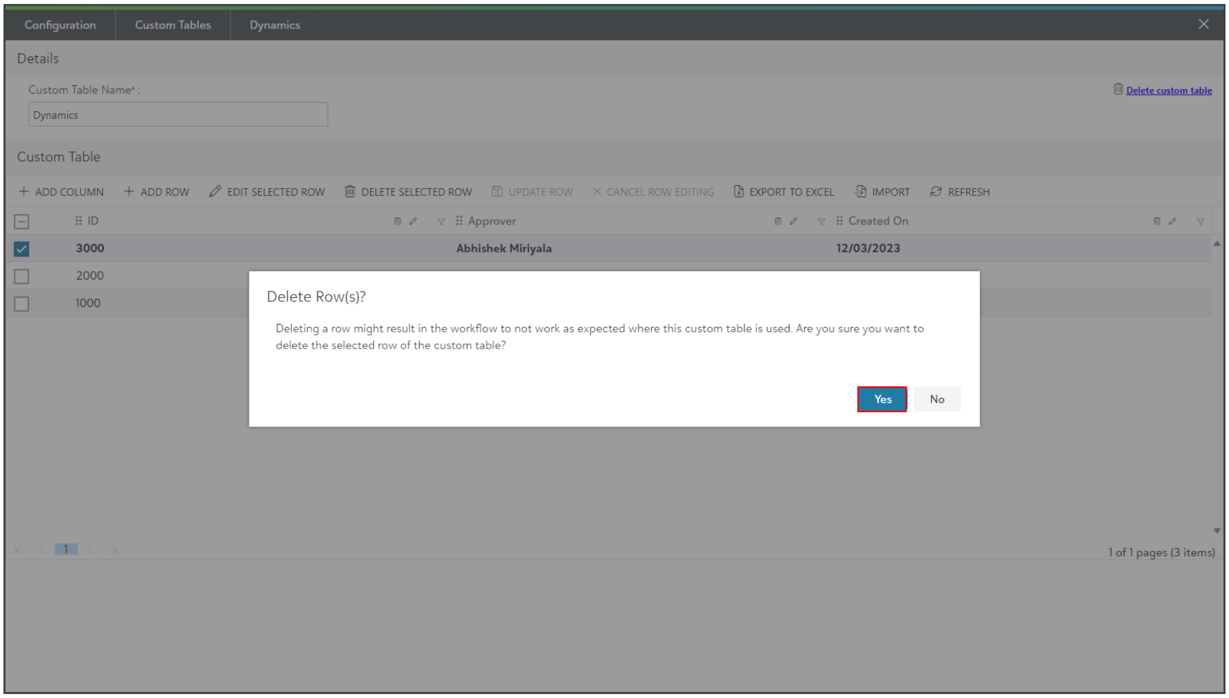
3) The Custom Tables full-page dialog appears as shown below.



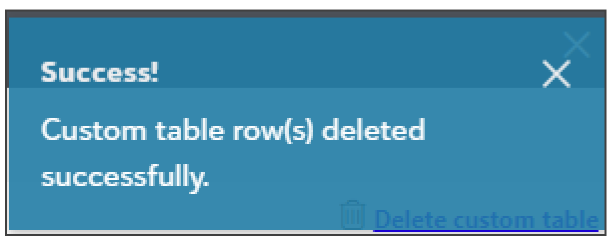
4) To delete the row, select the row and click on the **DELETE SELECTED ROW** option from the list toolbar as shown below.



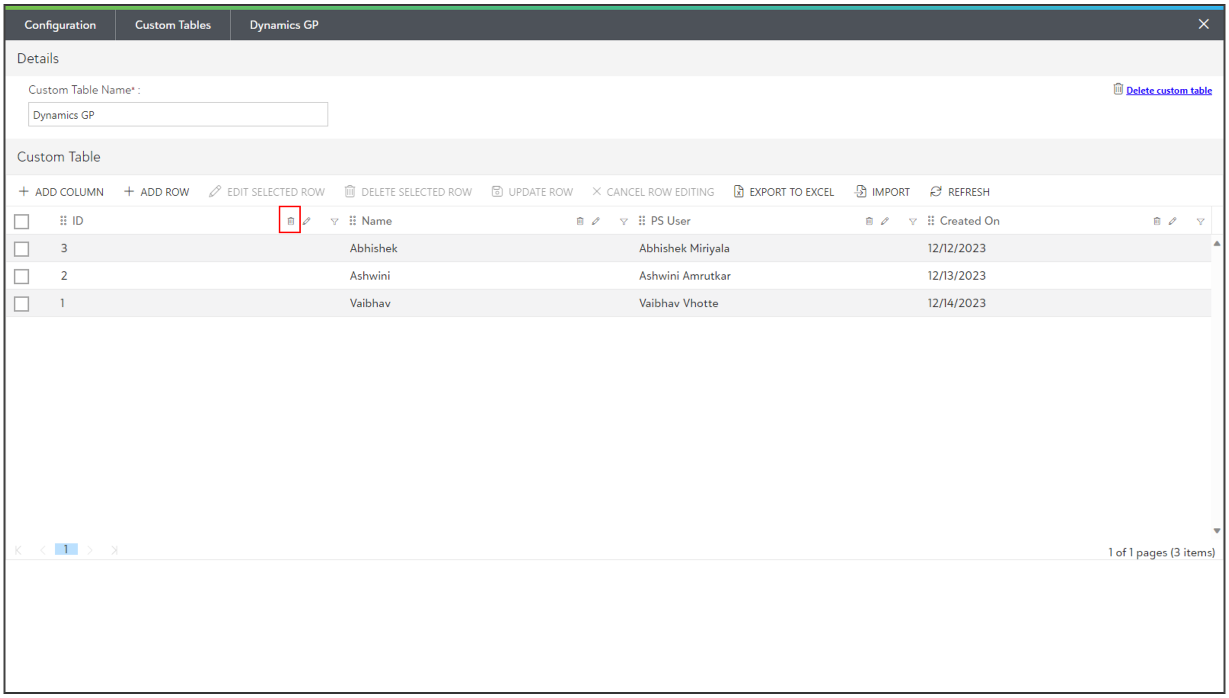
5) Now, a confirmation notification "Delete Row(s)?" pops up on the screen as shown below, click on **Yes** to delete the selected row.



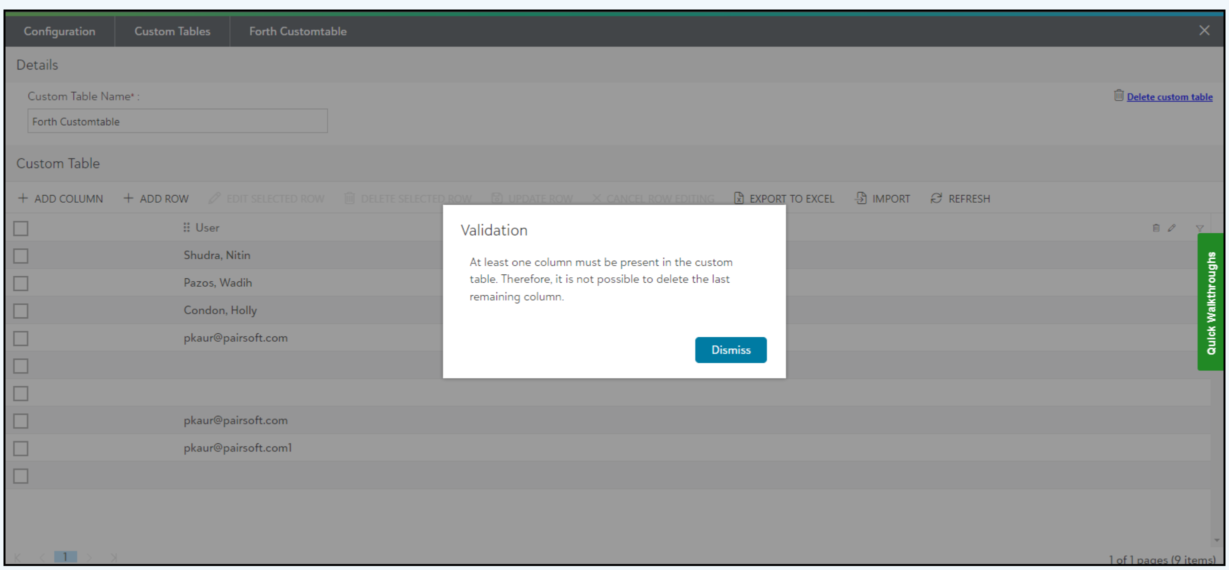
6) A successful notification appears on the top-right corner of the screen.



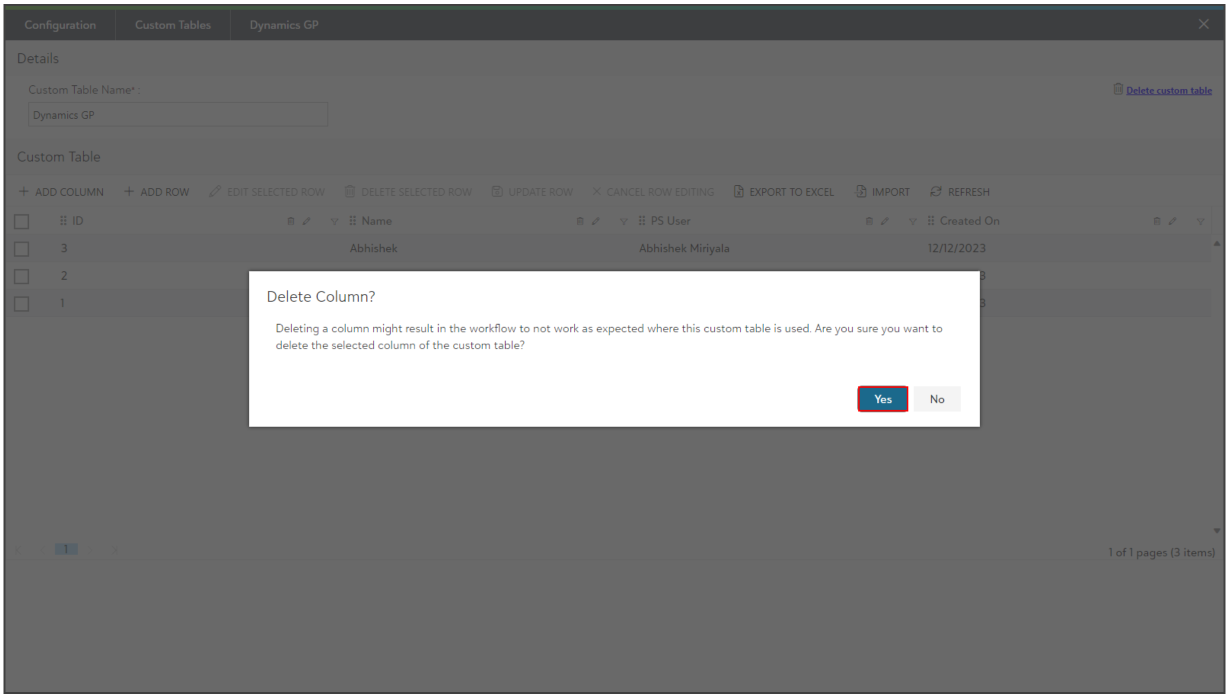
7) To delete the column, click on the 🗑 delete icon as shown below.



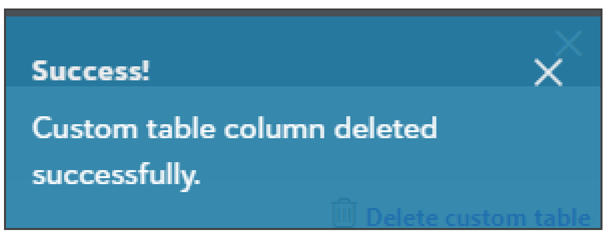
Note: A validation message "At least one column should be present in the custom table" pops up on the screen as shown below, when you try to delete last remaining column within the custom table.



8) Now, a confirmation notification “Delete column?” pops up on the screen, click on the **Yes** option as shown below.

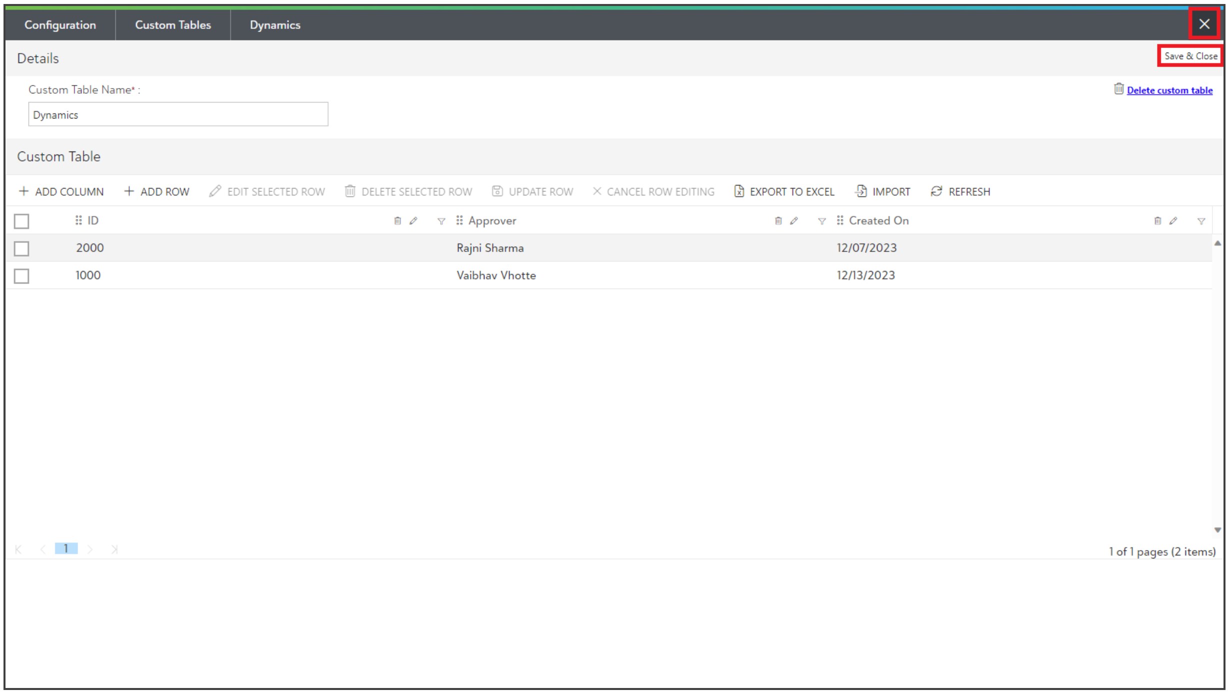


9) A successful notification appears on the top-right corner of the screen.

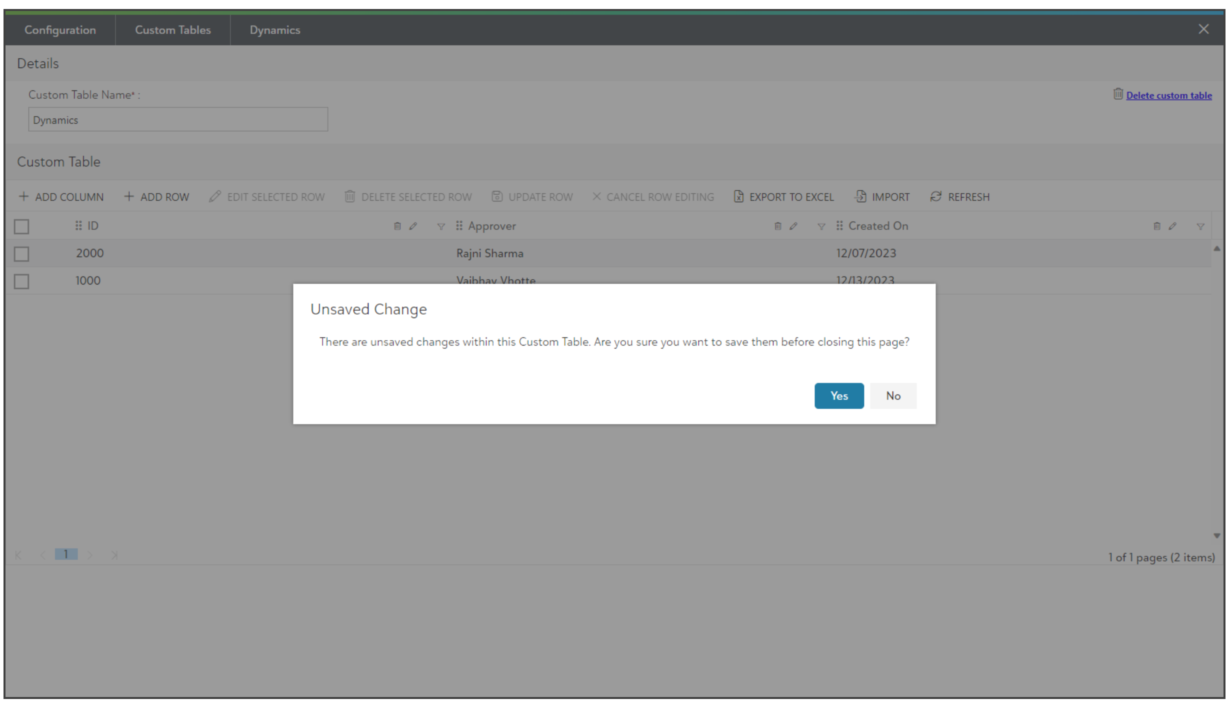


> **Note:** All the changes that you do in the table remain only in the grid, once you click on close and confirm to save the changes, then only it reflects all the changes in the database.

10) Now, click on the **X** button to **Save and close** the custom table.

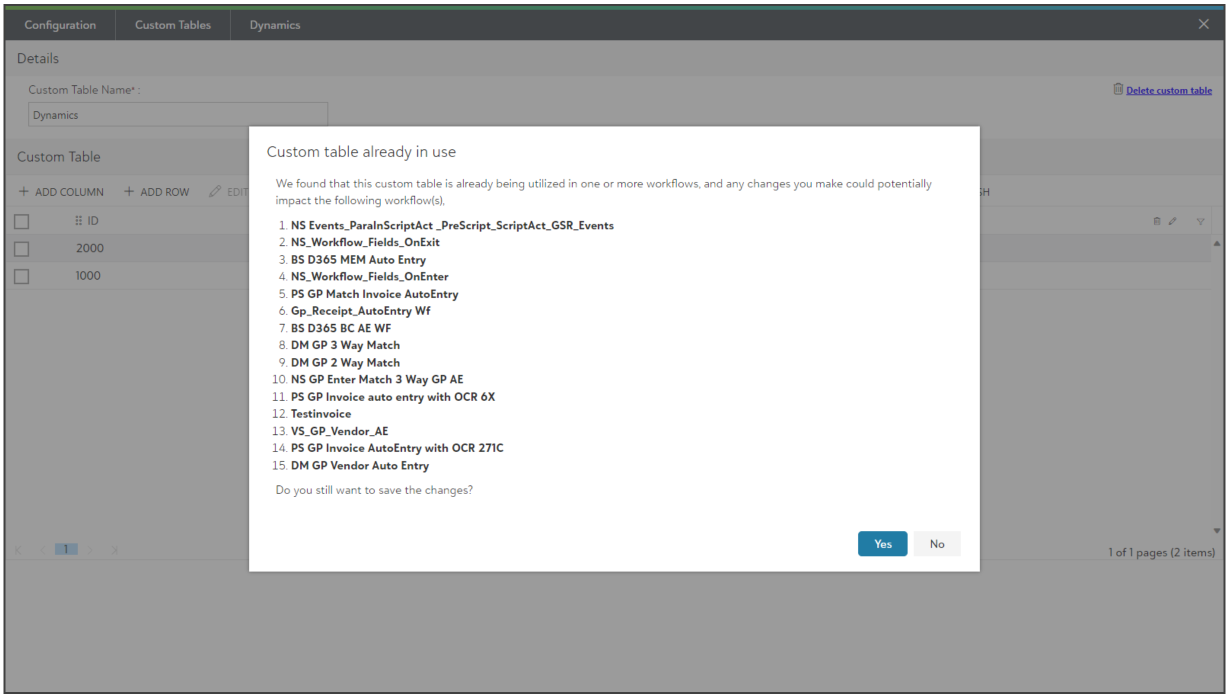


11) A notification "Unsaved Change "pops up on the screen, click **Yes** option to save the changes as shown below.

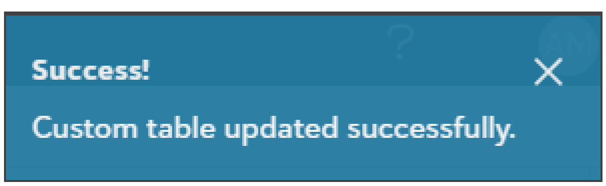


12) Now, it validates whether the custom table is used within any workflow or not. Refer to steps 12(a) and 12 (b).

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.

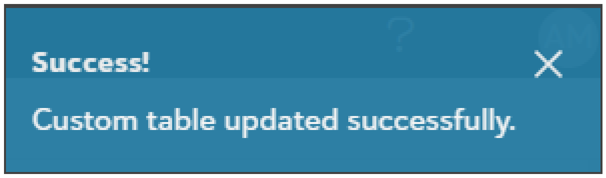


- If you click on the **Yes** option, a successful notification appears on the top-right corner of the screen and redirects to the Custom Tables list view page.



- If you click on the No option, the update operation gets cancelled and redirects to the Custom Tables list view page.

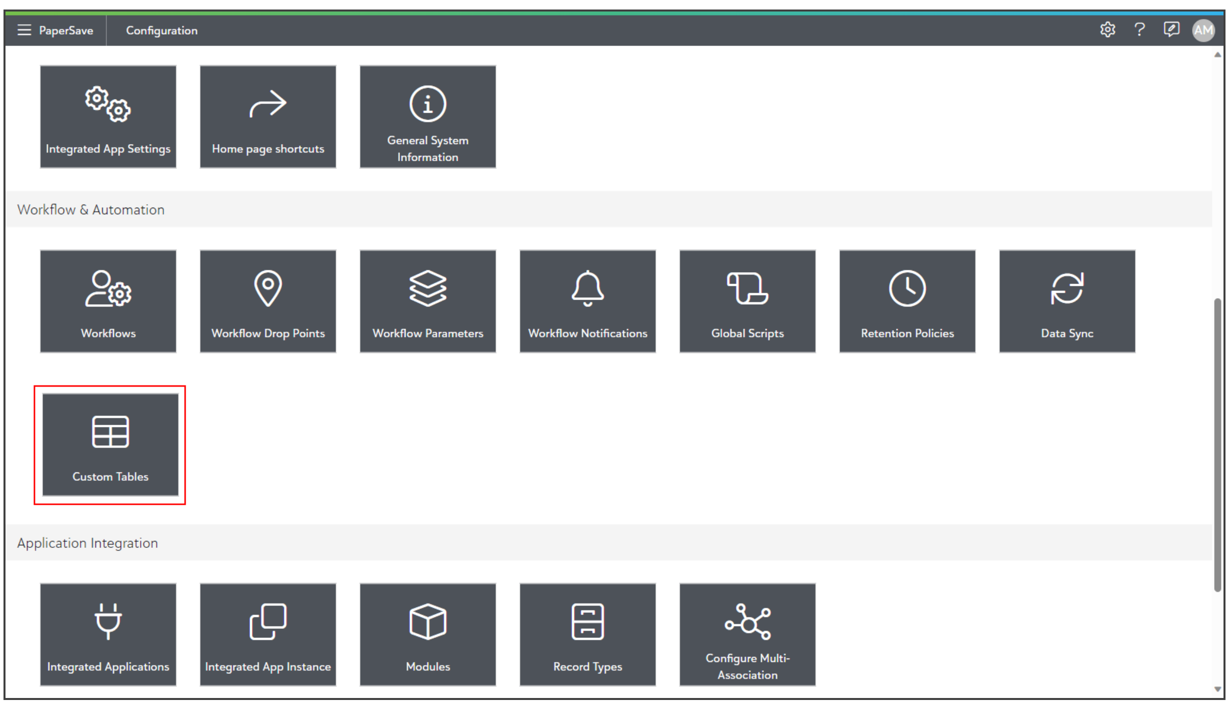
12(b) If the Custom table is not used in any of the Workflows, a successful notification appears on the top-right corner of the screen and redirects to the Custom Tables list view page.



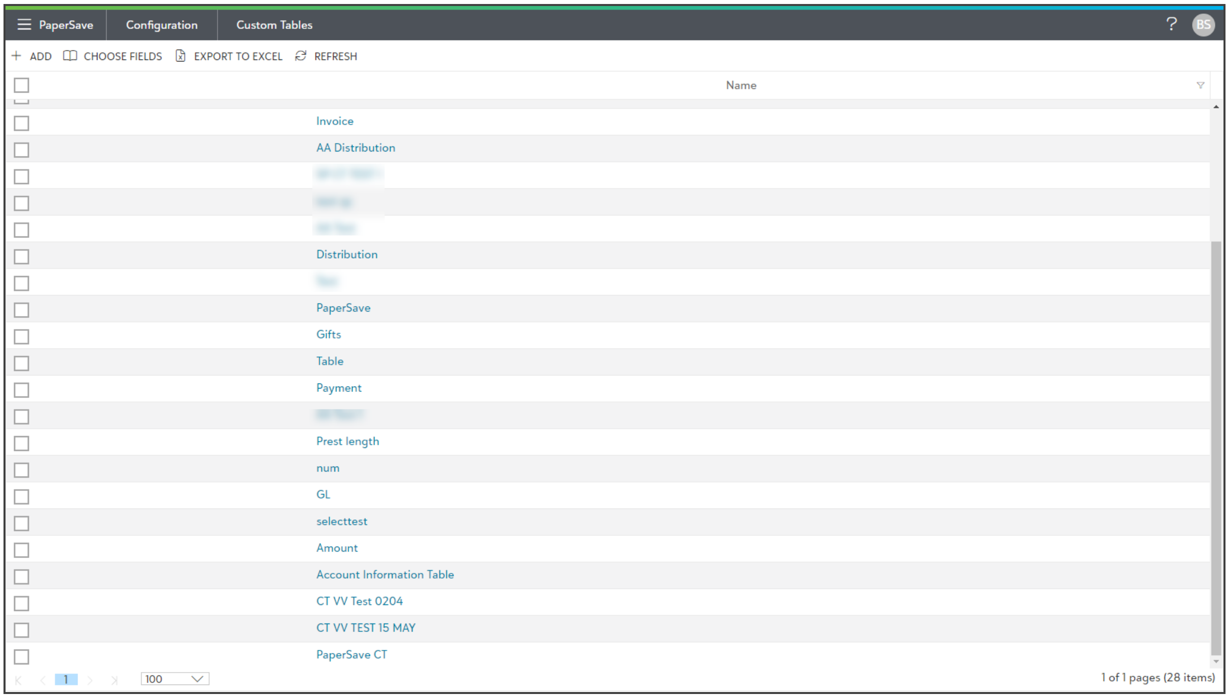
Deleting the Custom Tables

Follow the below steps to delete the Custom Table:

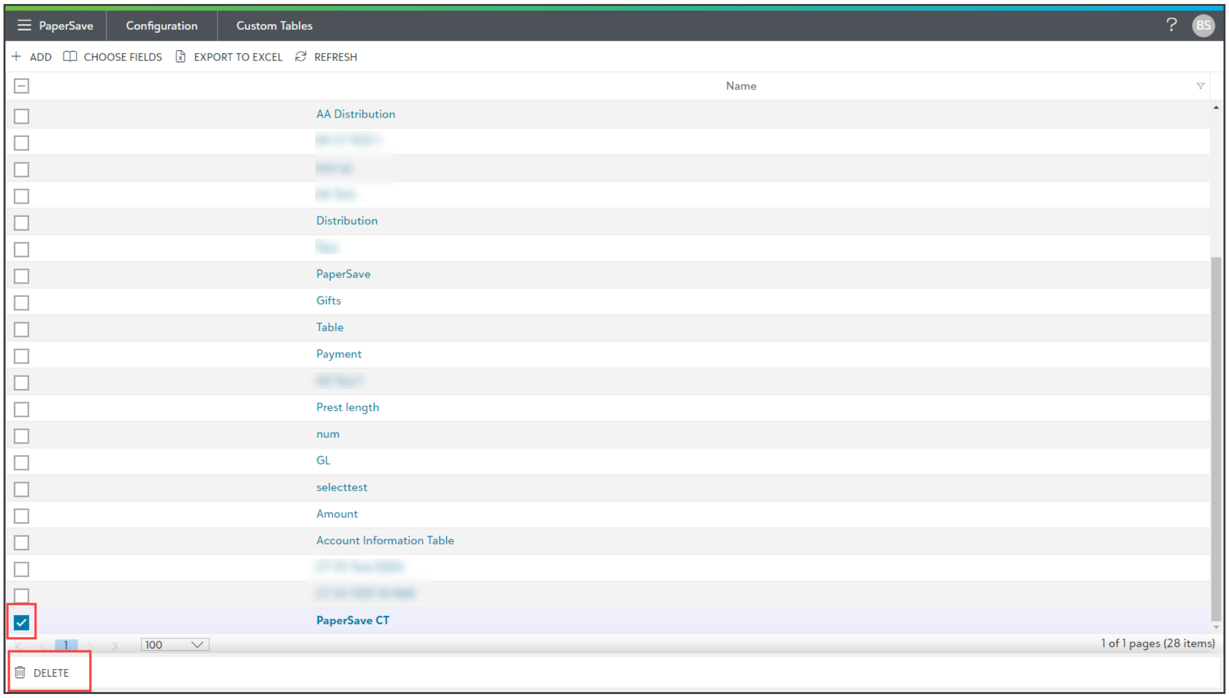
1) To delete the custom table, click on the **Custom Tables** tile in the **Workflow and Automation** section of the **Configuration Area**.



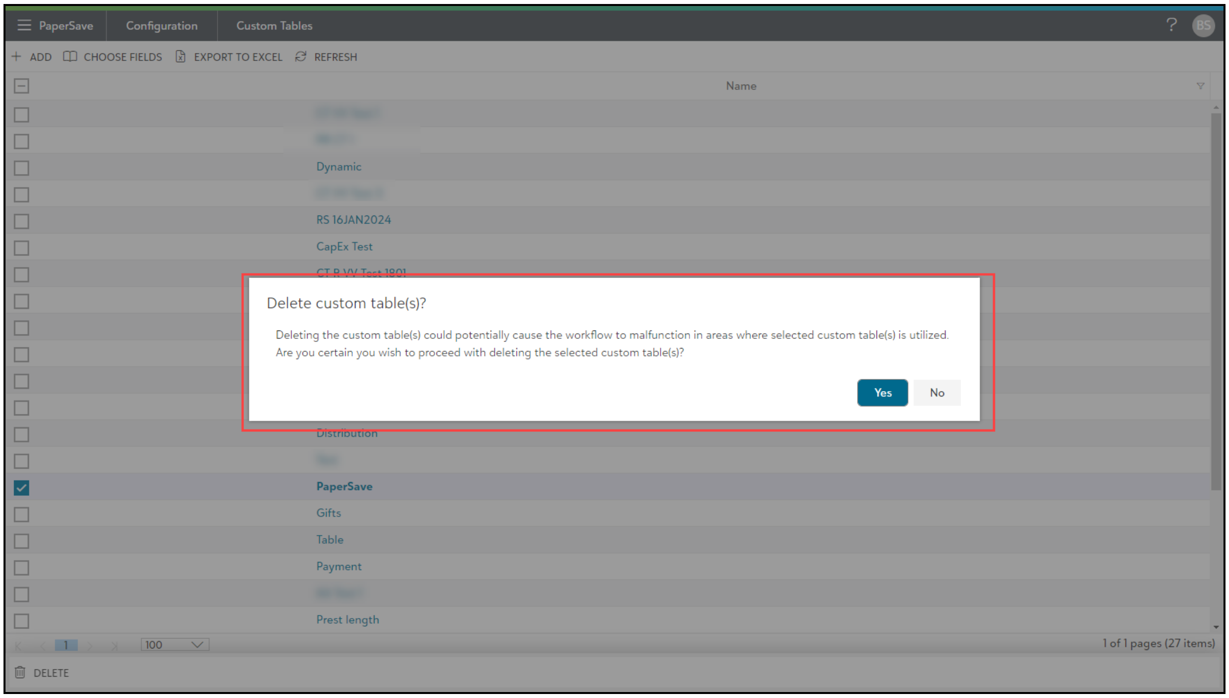
2) Now, the Custom Tables list view page opens, you can delete the Custom tables either from the list view page (as mentioned in step 3) or the details page (as mentioned in step 4).



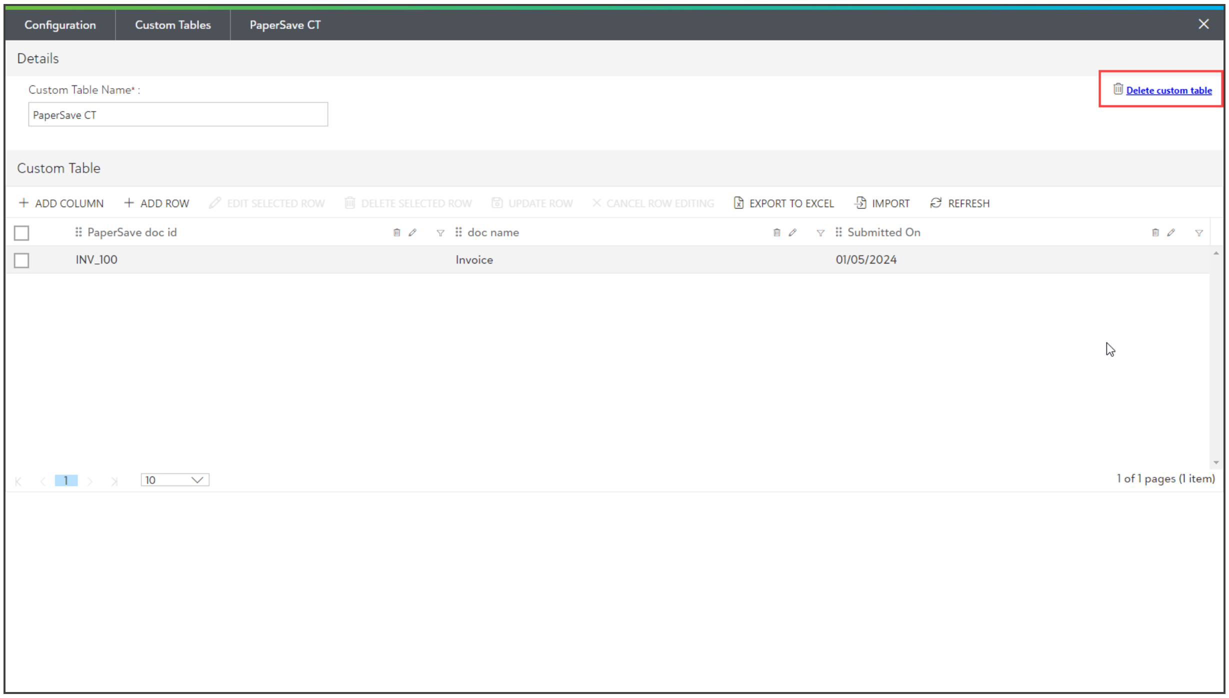
3) If you want to delete one or more Custom Tables, select the Custom Table(s) using the checkbox and then click on the **Delete** option from the slide-up panel as shown in the below screen.



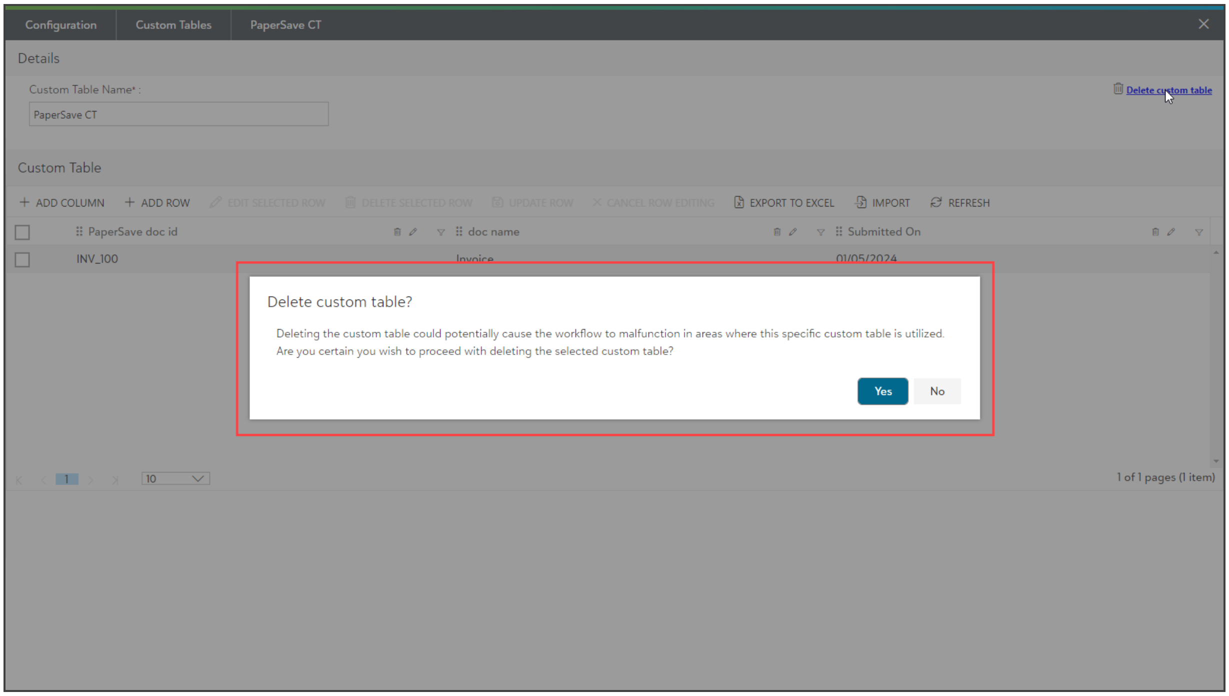
- Once you click on the **Delete** option, a confirmation message appears, as shown on the below screen where on clicking on the **Yes** it deletes the Custom Table and on **No** it discards the operation.



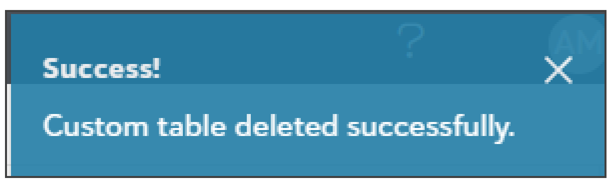
4) On the other hand, you can open any existing Custom Tables and click on the **Delete Custom Table** button within the full-page dialog box as shown in the below screen to delete a Custom Table.



- 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.



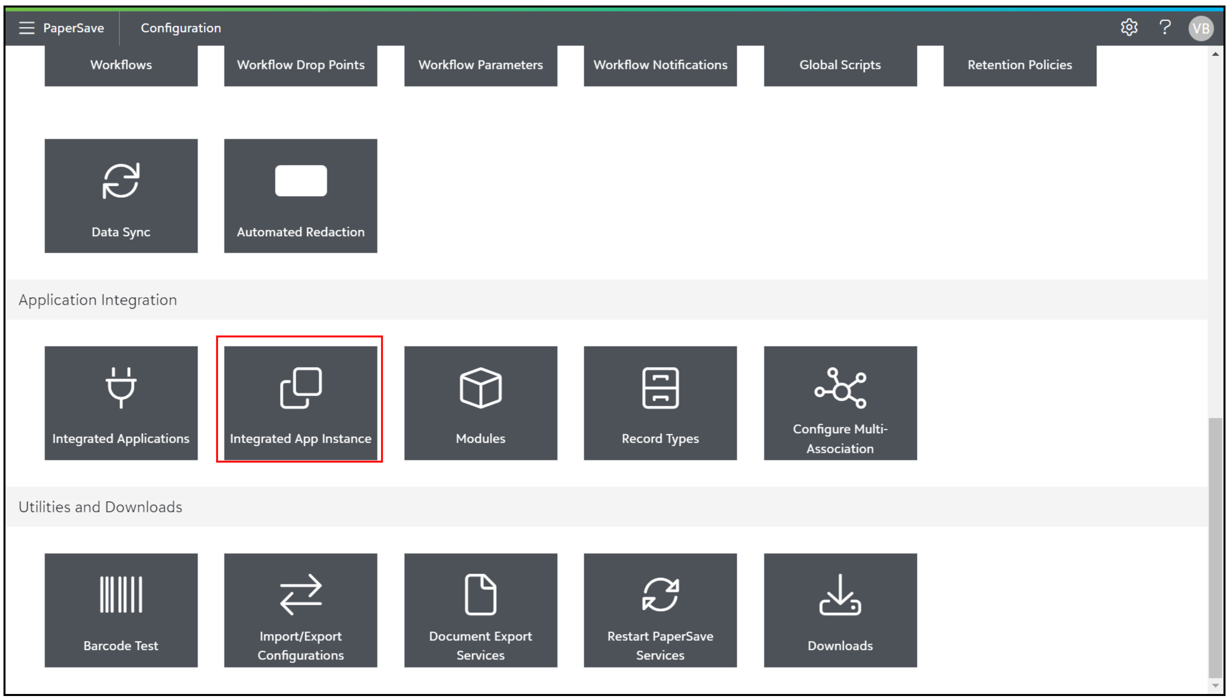
Application Integration

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.

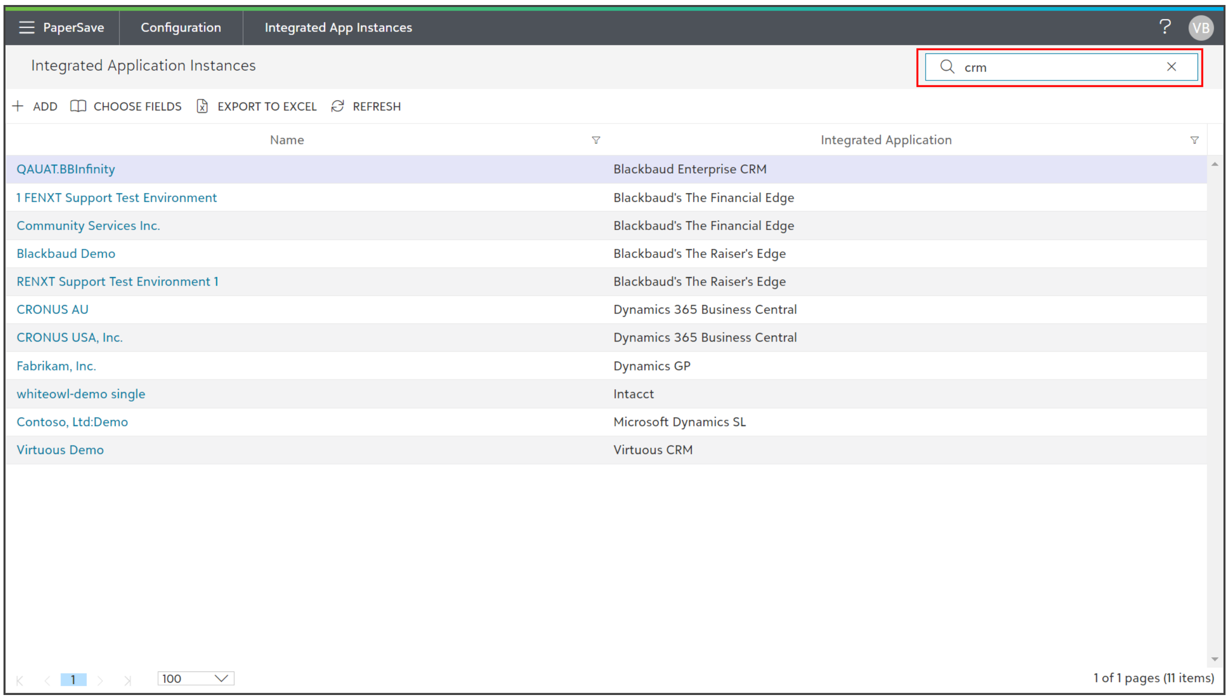
Tip: To save the updated value, you can click on **X**, press **Esc** from the keyboard, or click on the **Integrated App Instances** from the breadcrumbs available in the application bar.

Deleting Integrated App Instance

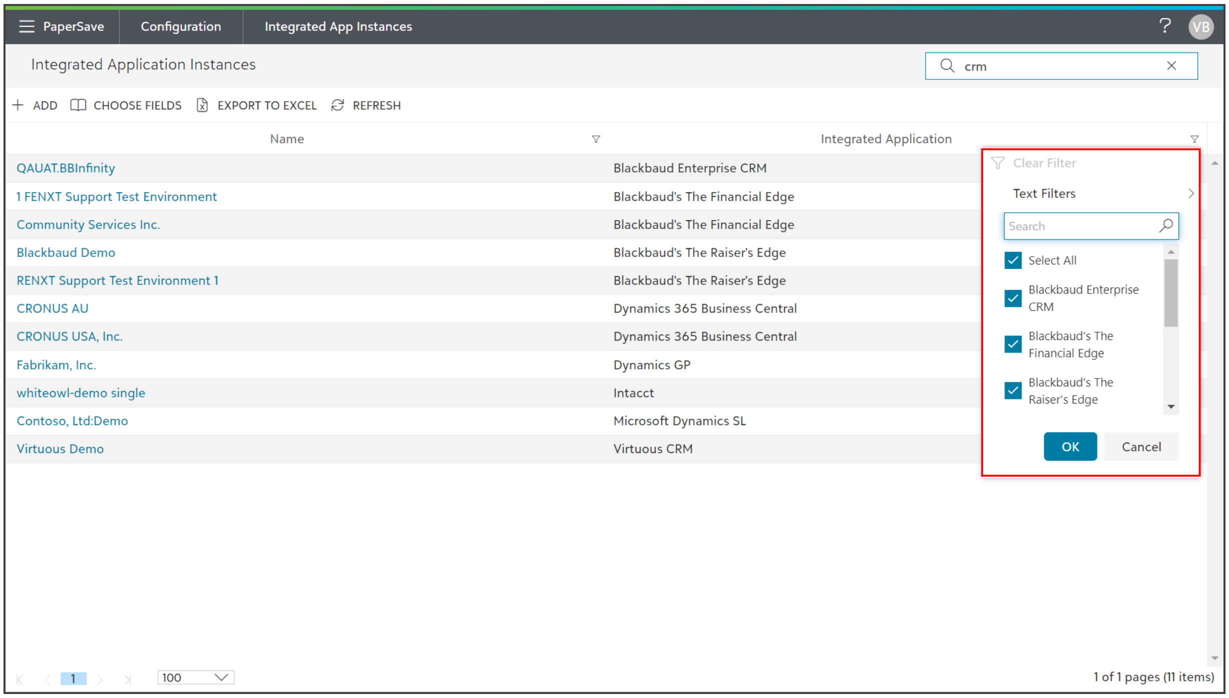
Follow the below steps to delete an Integrated App Instance:

1) Click on **Integrated App Instance** in the Application Integration section of the Configuration Area.

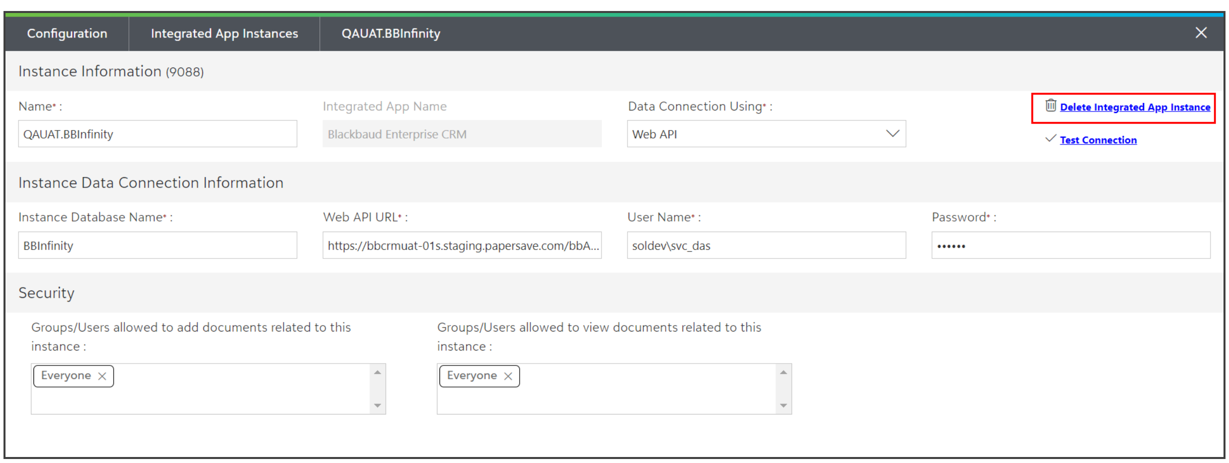
2) You can select the desired integrated app instance from the list or enter the keyword in a quick search to find the integrated app instance from the list as shown in the below screen.



- Also, you can use a column filter to narrow the search within the list of integrated app instances, as shown in the below screen.

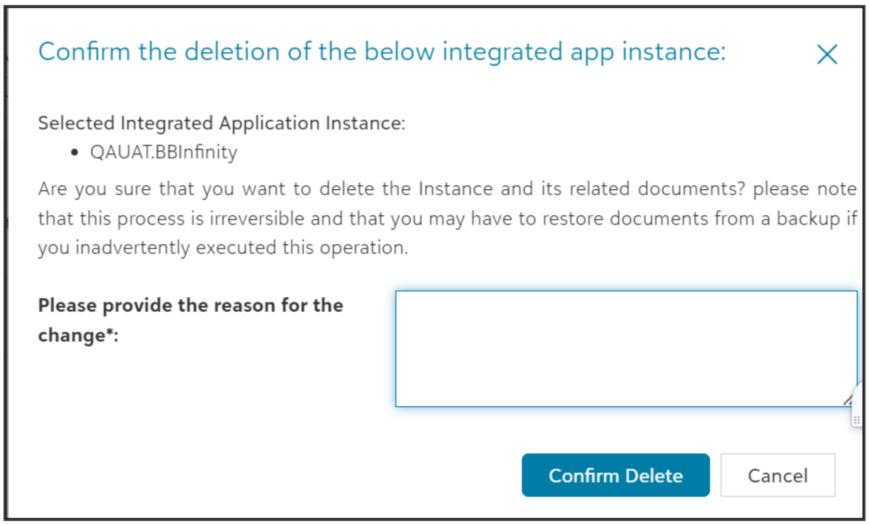


4) Now, click on the existing integrated app instance to open it in the edit mode and click on the **Delete Integrated App Instance** option within the full-page dialog box as shown in the below screen.



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.

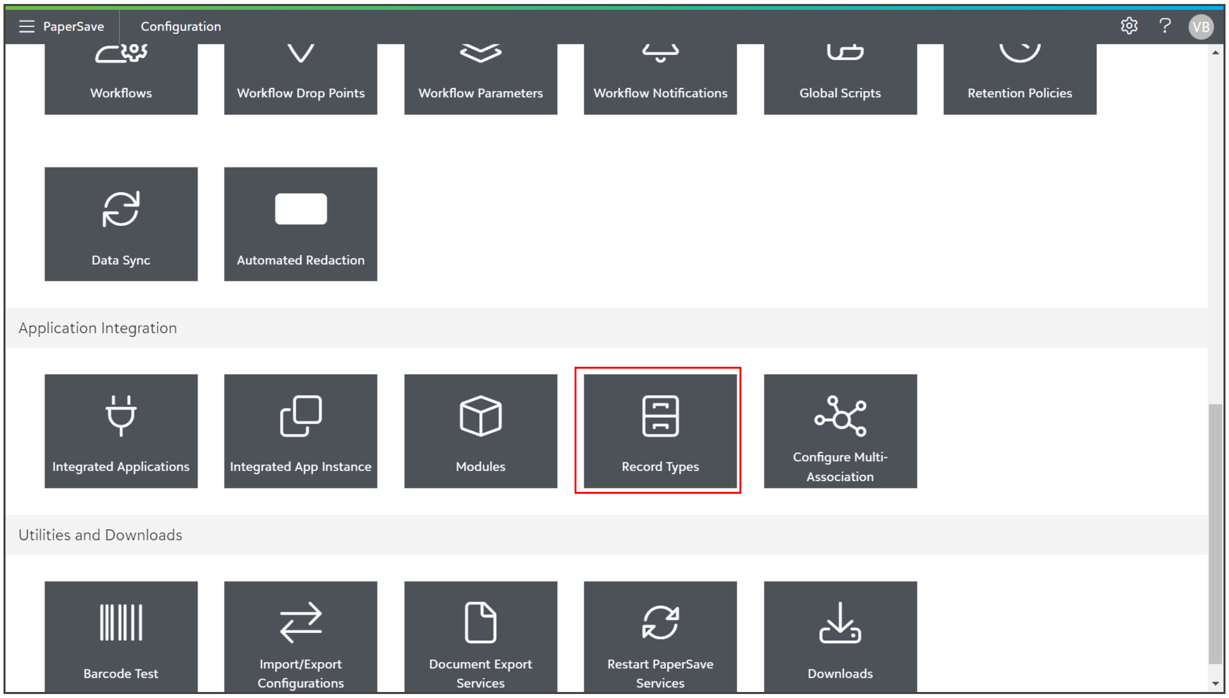
> **Note:** PaperSave includes the reason for the deletion of an instance in the audit log.



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 toolbars 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

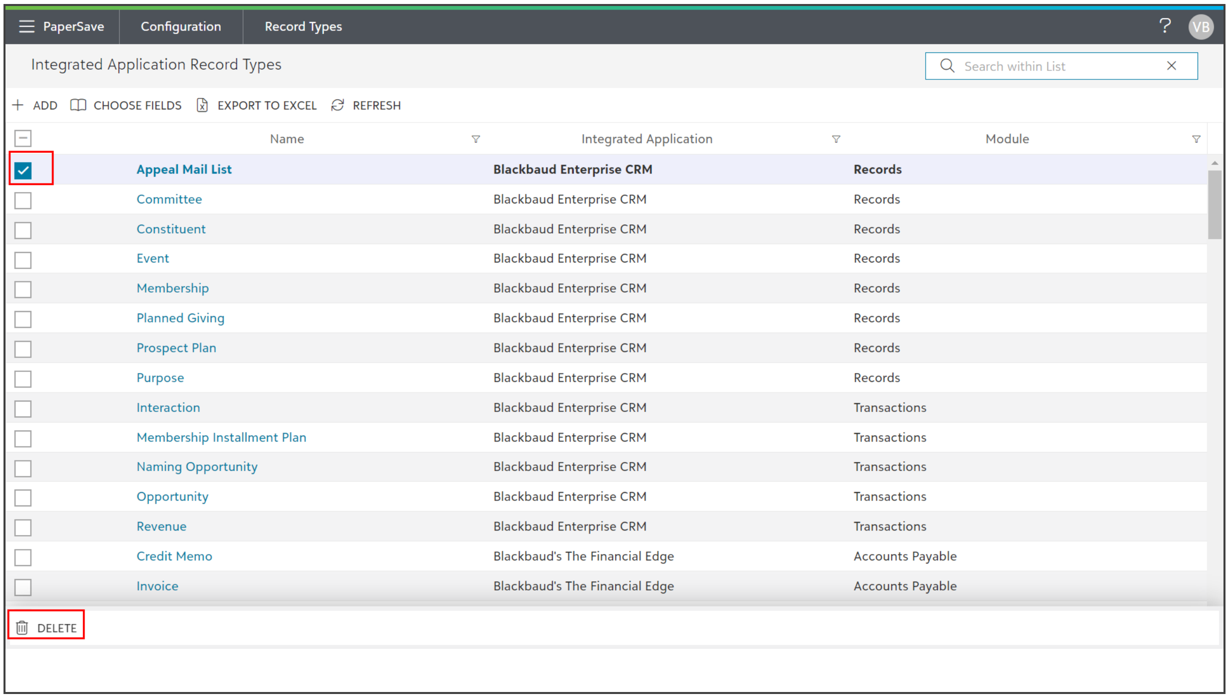
Watch the video to know how to manage a Record Type.

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.

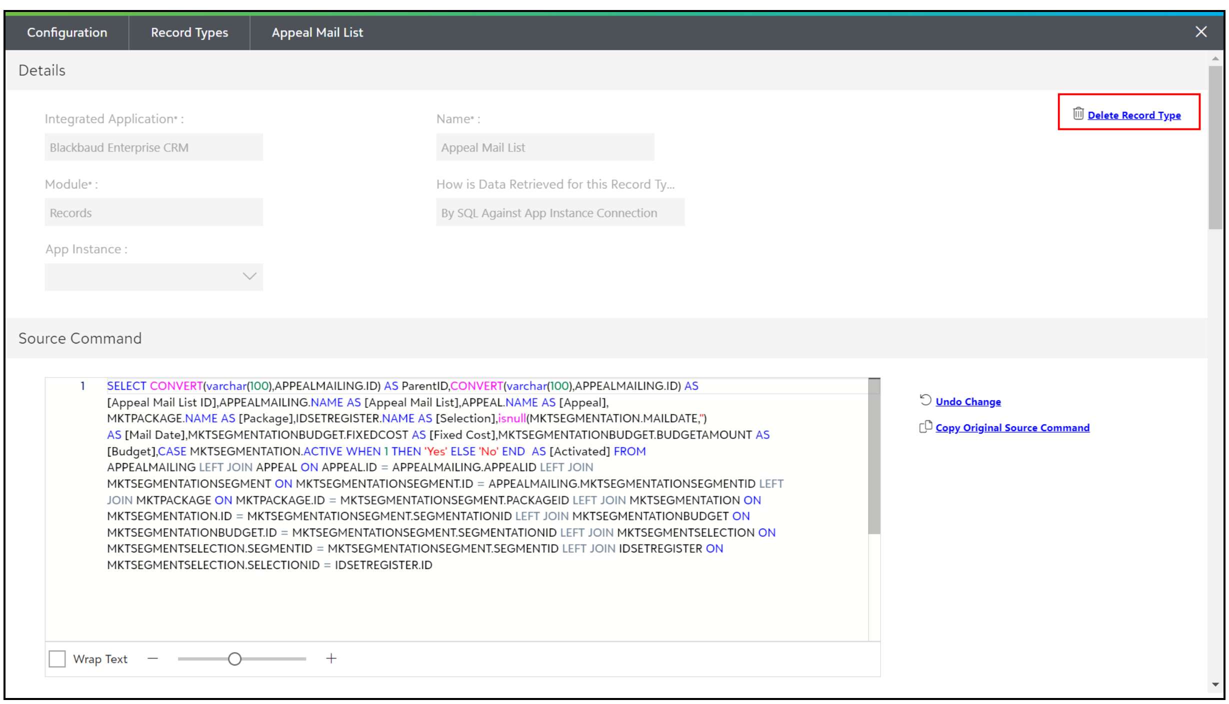
Deleting Record Type

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.



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.



> **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 paperwork 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:

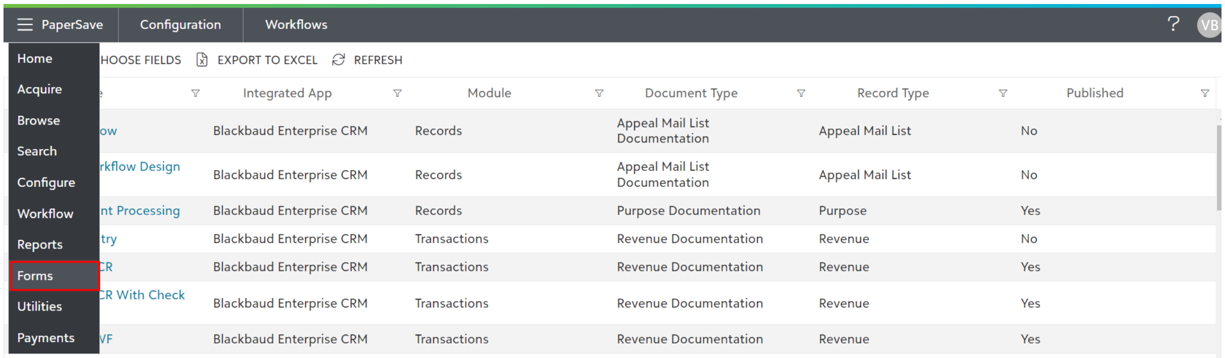
- **Accessing Smart Forms**
- **Viewing Workflow items submitted via Smart Forms**
- **Modifying the Smart form values**

Accessing Smart Forms

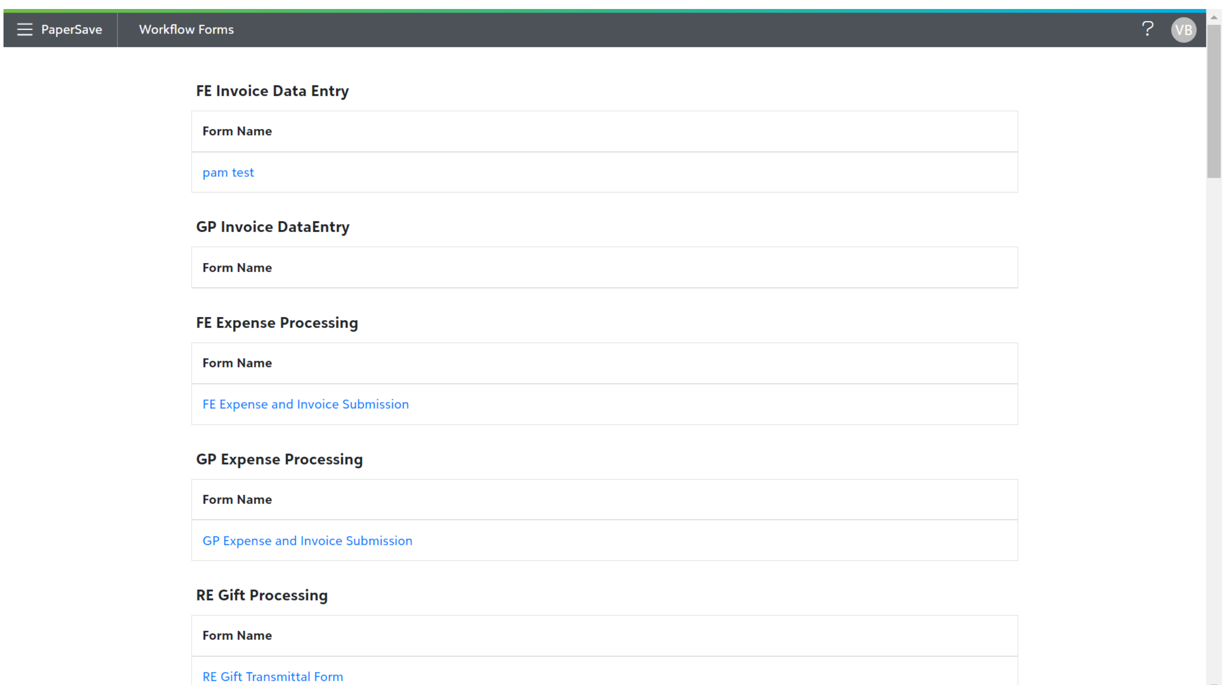
Once the Smart Forms are created within the Workflow section, they can be accessed by the respective users from the "Forms Area" in PaperSave to fill in the details and submit the form as a Workflow item to the respective Workflow.

Follow the below steps to access a Smart Form:

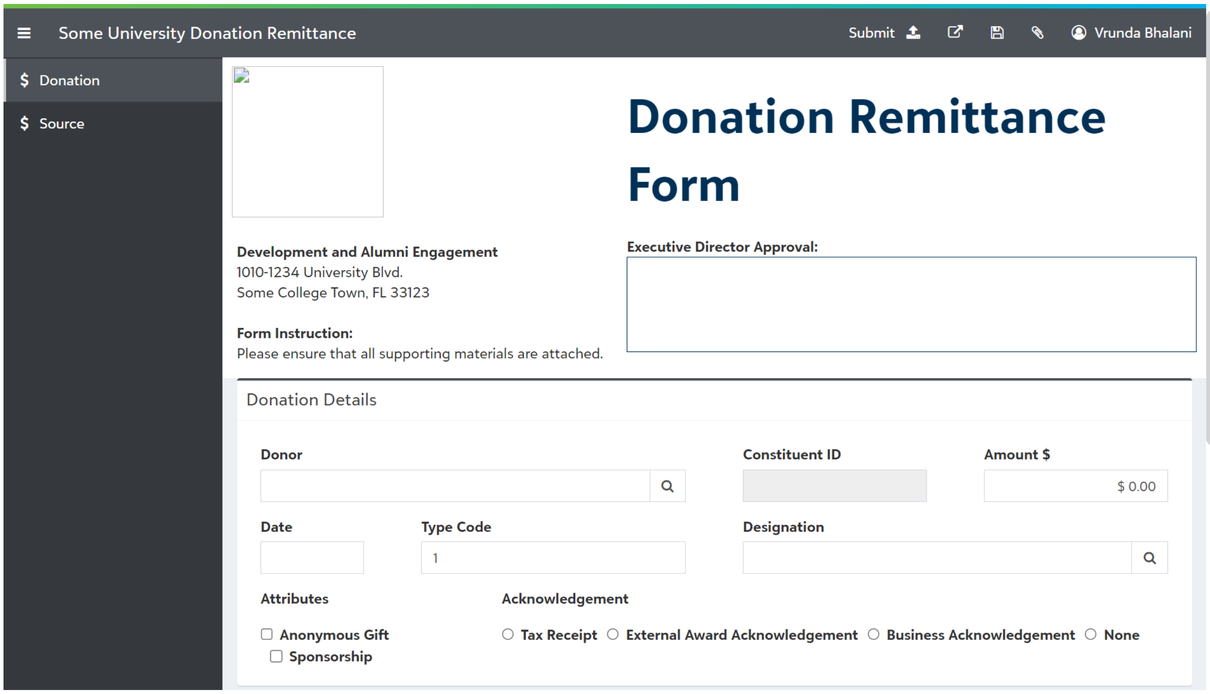
1) Click on PaperSave navigation menu from the top left corner in the application bar. Now, select **Forms** from the list, as shown in the below screen.



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.

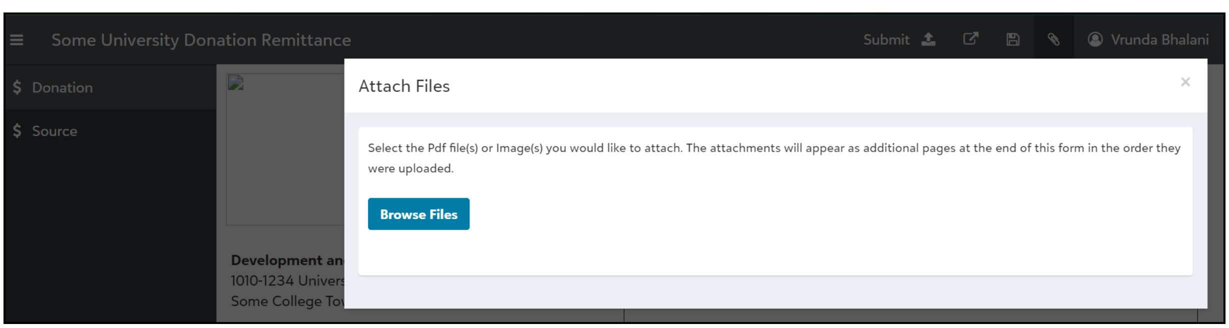


4) Enter the required details in the Smart Form.

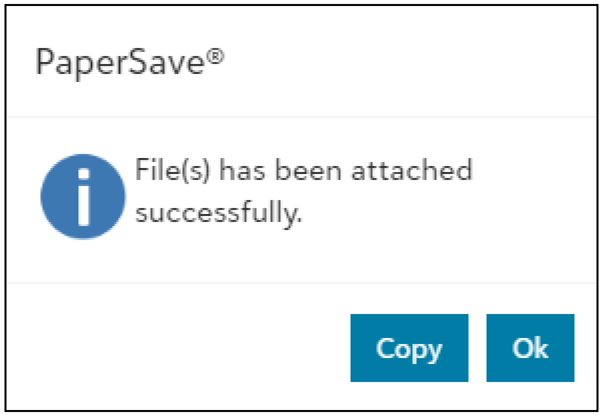


5) Now, there are various options available in the top-right corner of the screen, as shown in the below screen. The following is a description of each option.

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.



- 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 " " 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.

Form Submission Preview

Submit

Please review the form prior to submission, then press submit.

Vendor Details

Transaction Date	Vendor	Pay To Contact	Return To Contact
29/12/YYYY	Accelcia Business Service Inc	Accelcia Business Service Inc	Accelcia Business Service Inc

Basic Details

Payment terms	Vendor Document Number	Message
Net 60	Vdoc	

Due Date	Reference Number	Company
29/12/YYYY		demo12829676

Line Items Details

LineItems

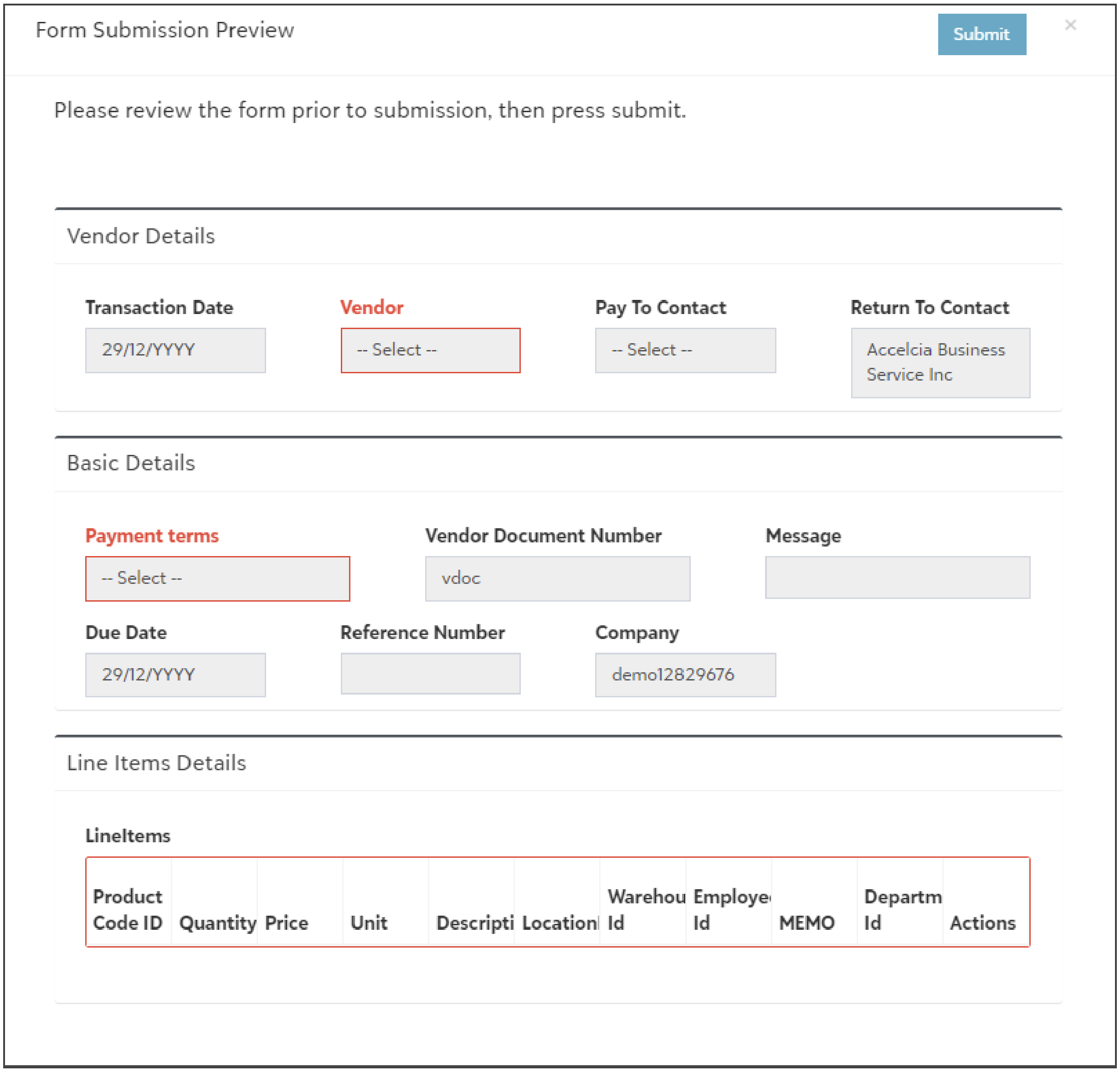
Product Code ID	Quantity	Price	Unit	Descripti	Location	Warehou Id	Employe Id	MEMO	Departm Id	Actions
CPU	1	$ 10.00	Each	desc	Clermont	Secondar	-- Select --			

Attached File(s)

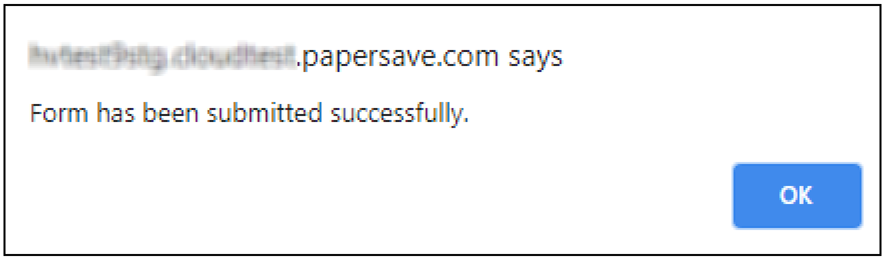
Northwind Traders 10979 2way.pdf

Rallye Productions 50080 2way.pdf

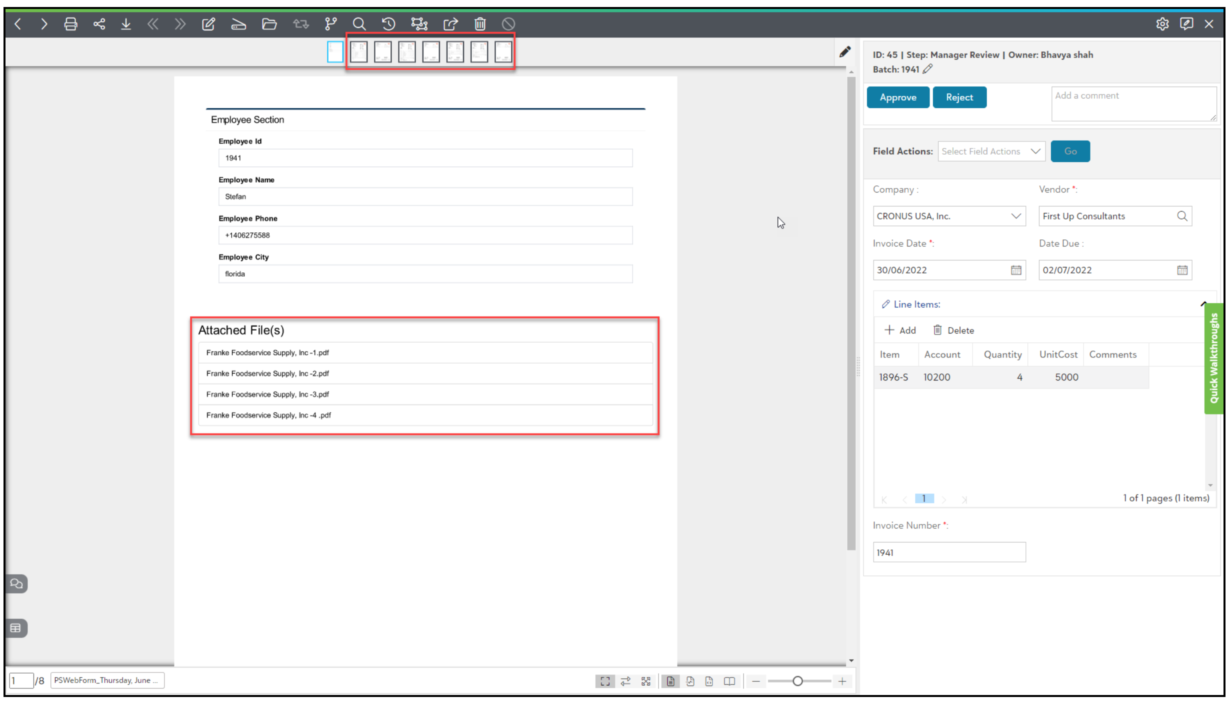
- If any mandatory fields are not filled, then such fields will be highlighted, and the **Submit** button will be disabled, as shown in the below screen.



- 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.



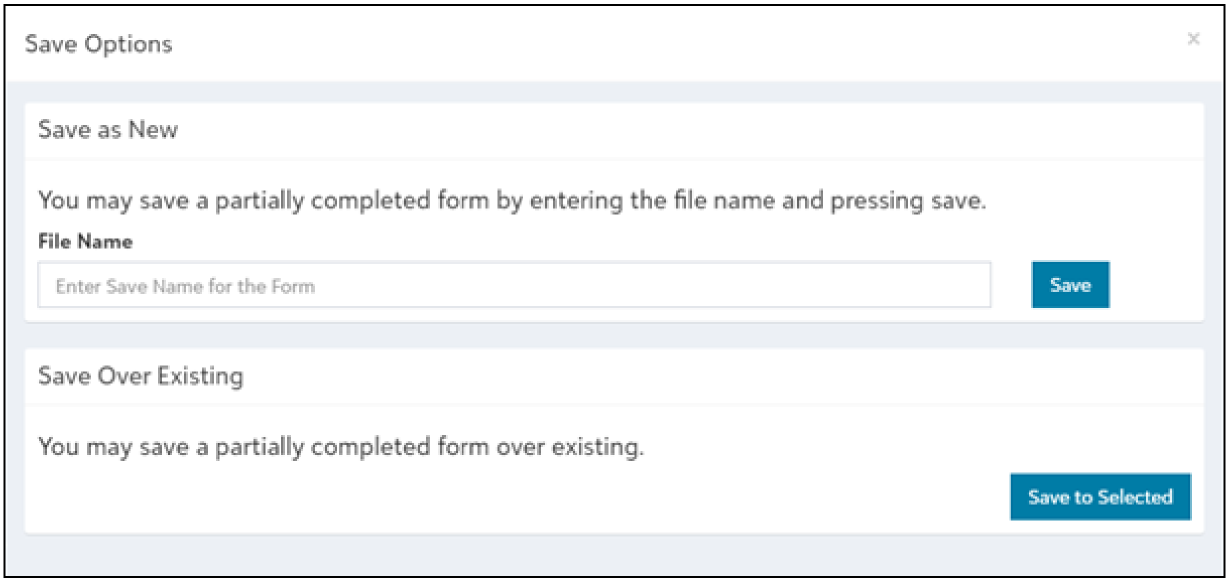
- The form is submitted. You can access the form from Workflow. The form will be displayed as shown in the below screen. The attachments filename are displayed at the bottom of the Smart Form page and the attached documents gets merged with the Smart form document. You can click on the pages from the thumbnail to view the attached files.



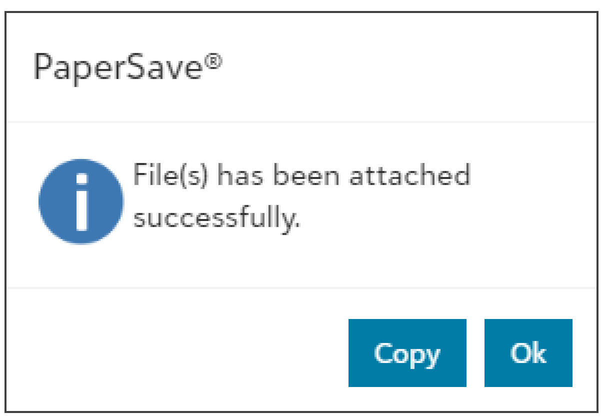
b) **Save Options**:

This option allows you to save certain field values which could be used by other users to autofill the fields in the form.

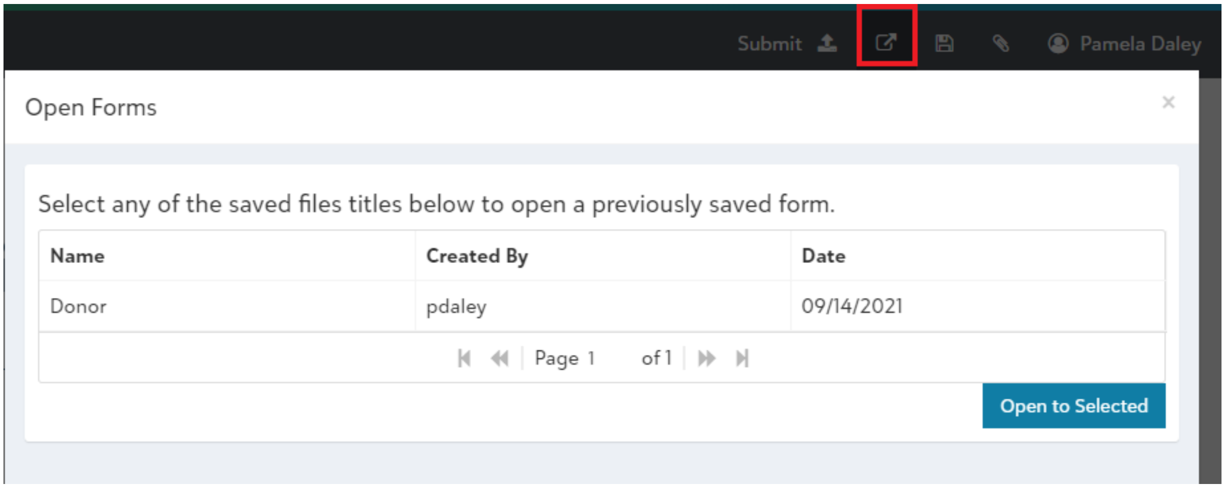
- Click on the **Save** button to open a dialog box, as shown in the below screen.



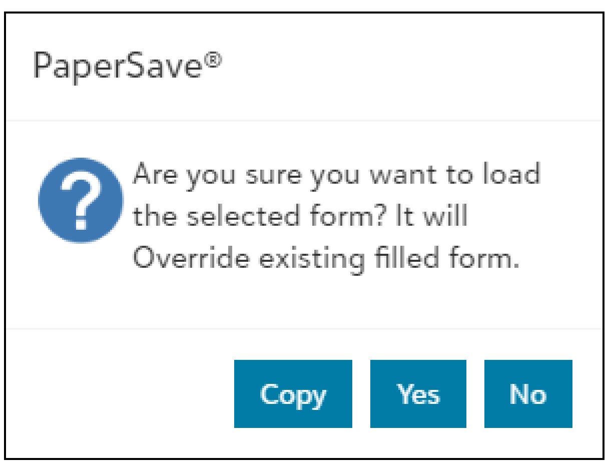
- Enter the desired name in File name option to save the partially filled form. Also, you can click on "**Save to Selected**" to save partially completed form over the existing form.
- Once the file is saved successfully, a confirmation dialog box will pop up as shown in the below screen.



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 over-ride the saved field values.



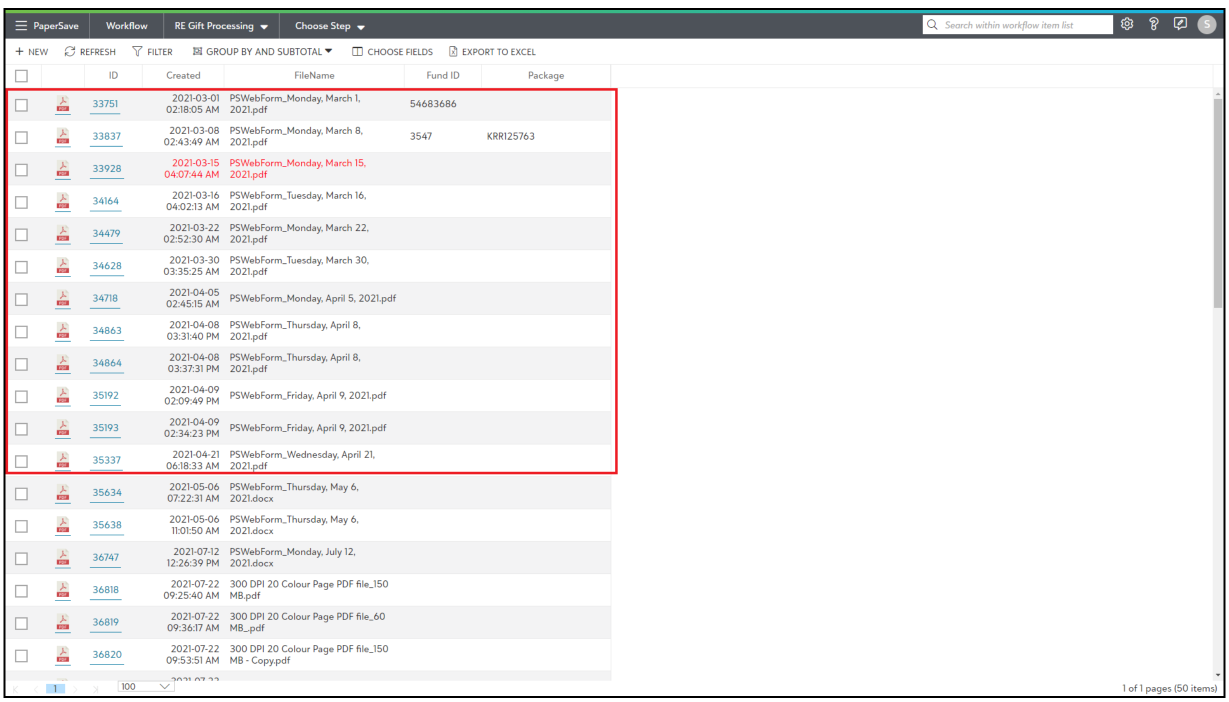
> **Note:** '**Save Options**' and '**Open Saved Files**' options will be available only for Private Smart Forms.

Viewing Workflow items submitted via Smart Forms

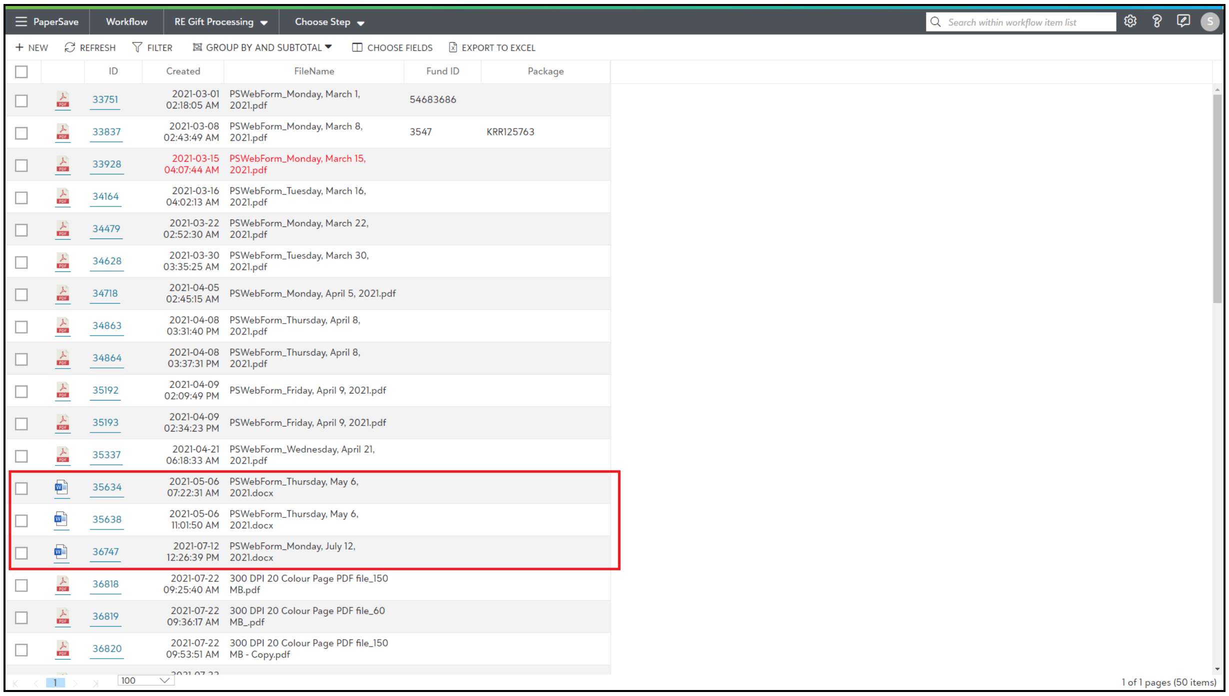
You can view the Workflow items that are submitted using the smart forms from within the Workflow Area. Follow the below steps to view the Workflow items.

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.

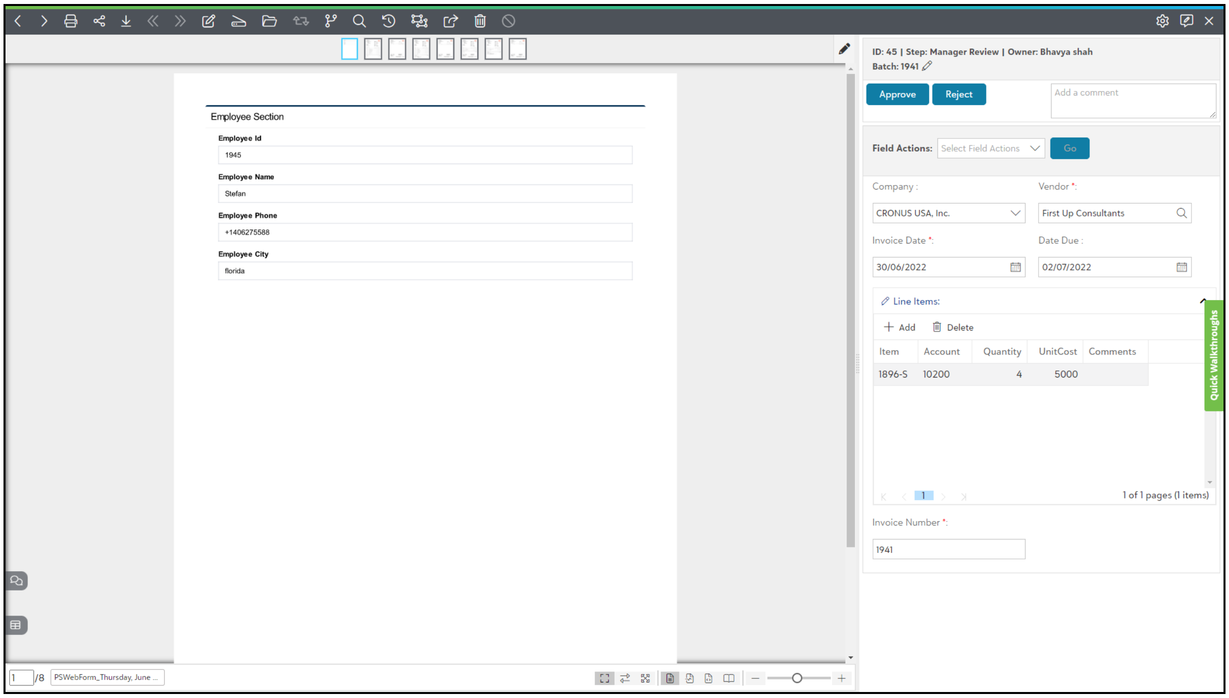


Note: The Workflow items submitted via Smart forms with output type "Smart form content" will have extension as ".pdf" (shown in the above screen), whereas the ones with output type "Word Mail Merge" will have extension of ".docx", as shown in the below screen.

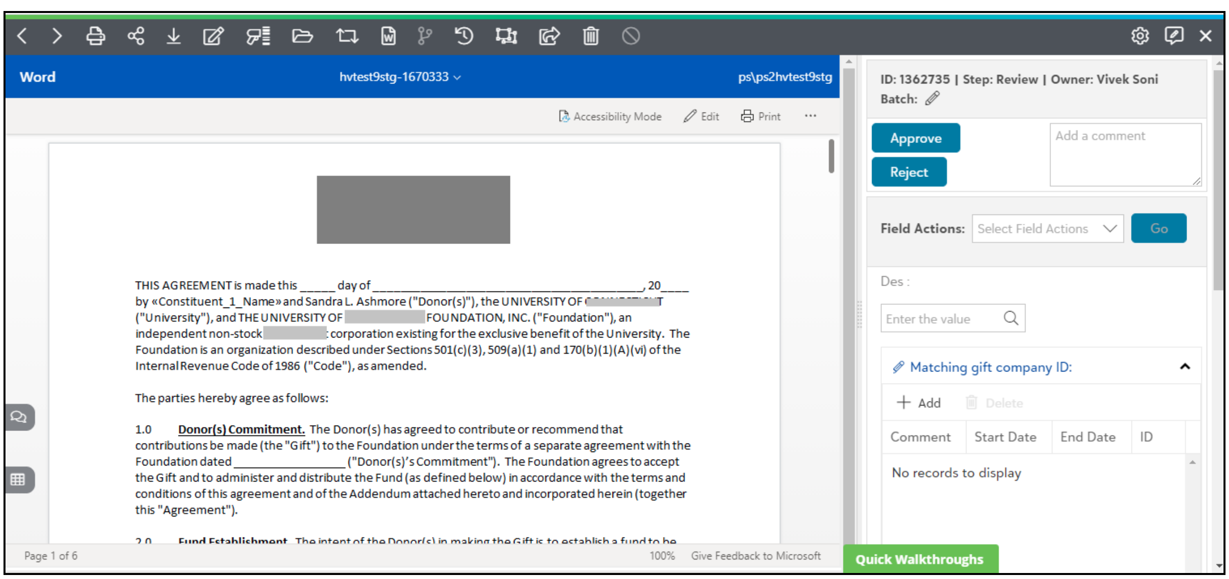


3) **Click** on the Workflow item (submitted via Smart form) to open it in the Workflow item viewer. You can see the submitted Workflow item via smart form, as shown in the below screen. Here, if there are any existing attachments or newly added attachments, then it gets displayed in the "Attachments" 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.

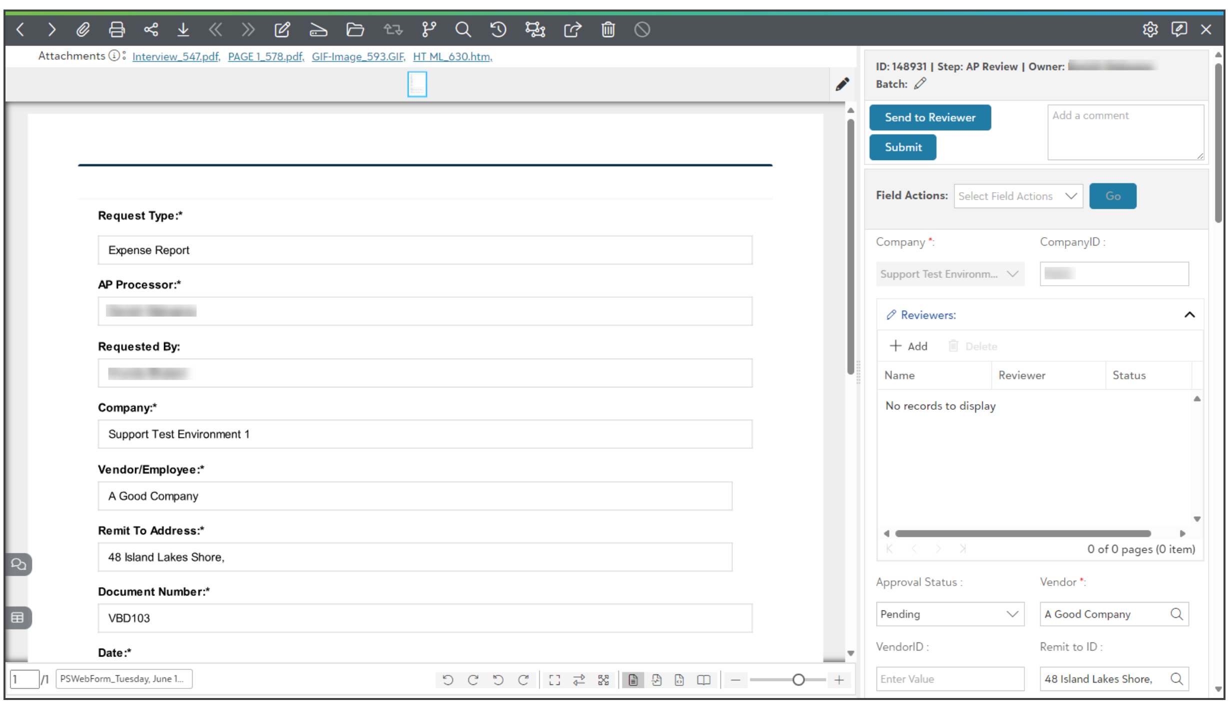
Let's refer to the below two sections to understand how to add and manage the Attachment functionality for Smartform:

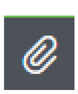
- [Adding the Attachments]
- [Viewing the Attachments]
- [Renaming/Deleting the Attachments]

Warning: Currently, Email mime type attachments, i.e., .eml, and .msg, cannot be added to smart form.

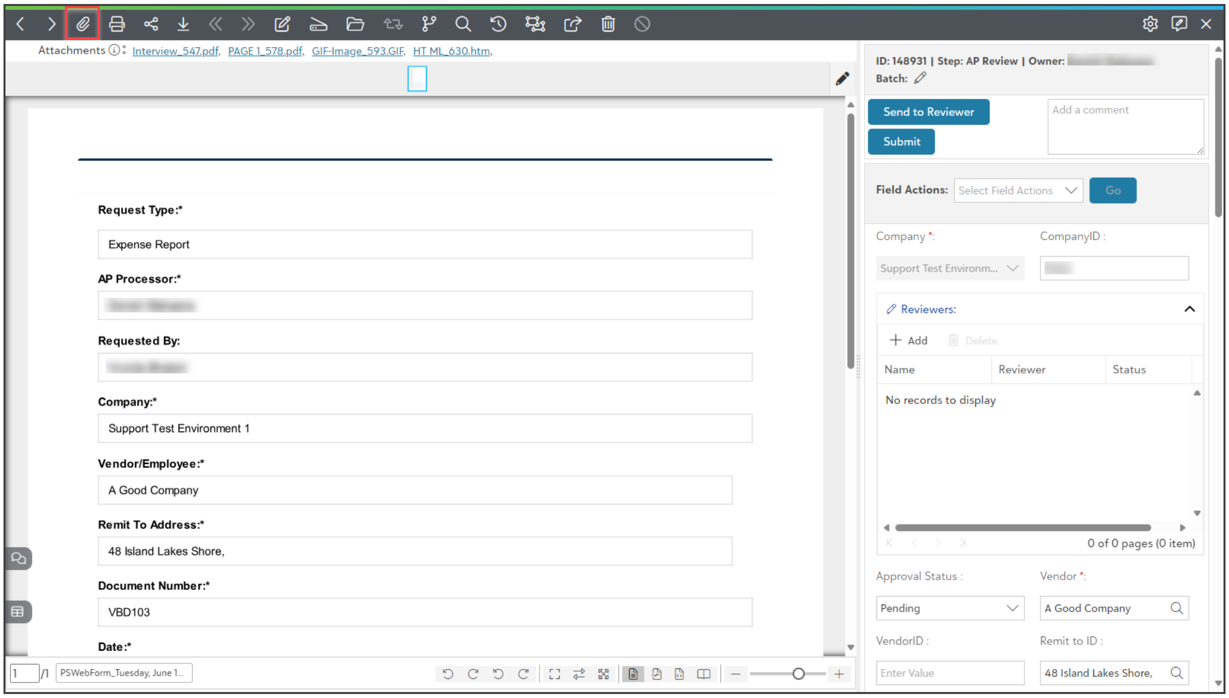
Adding the Attachments

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.

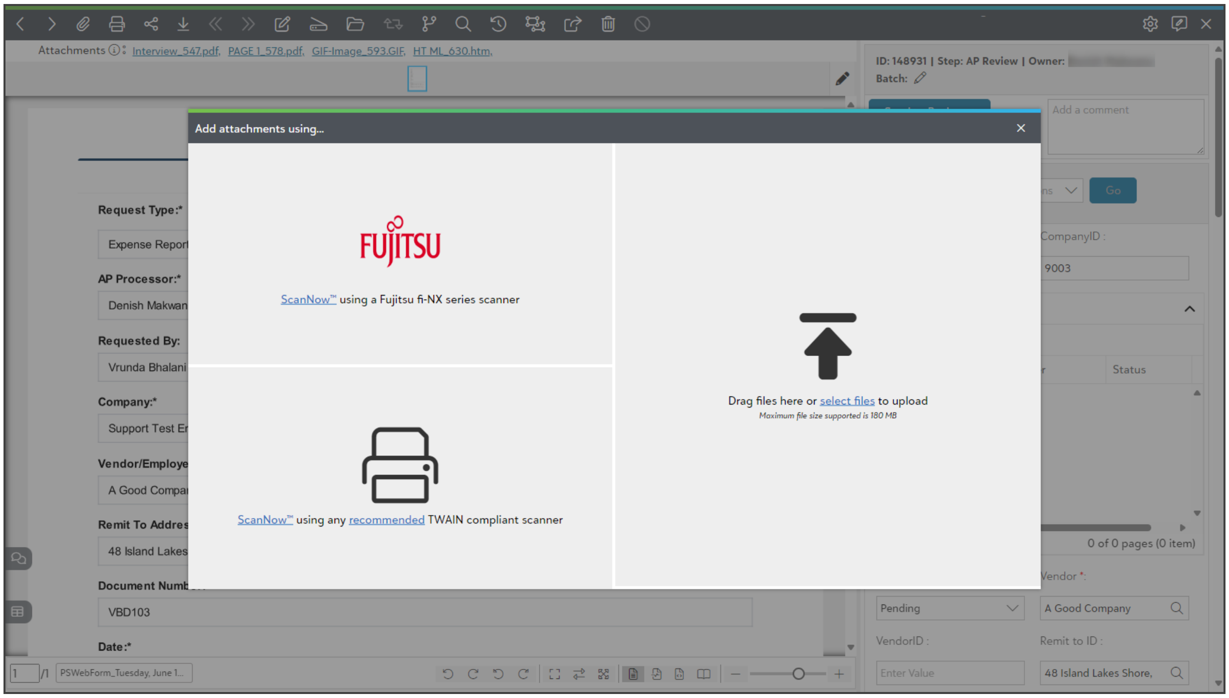


2) Now, click on the  Paperclip icon as shown below to add an attachment.

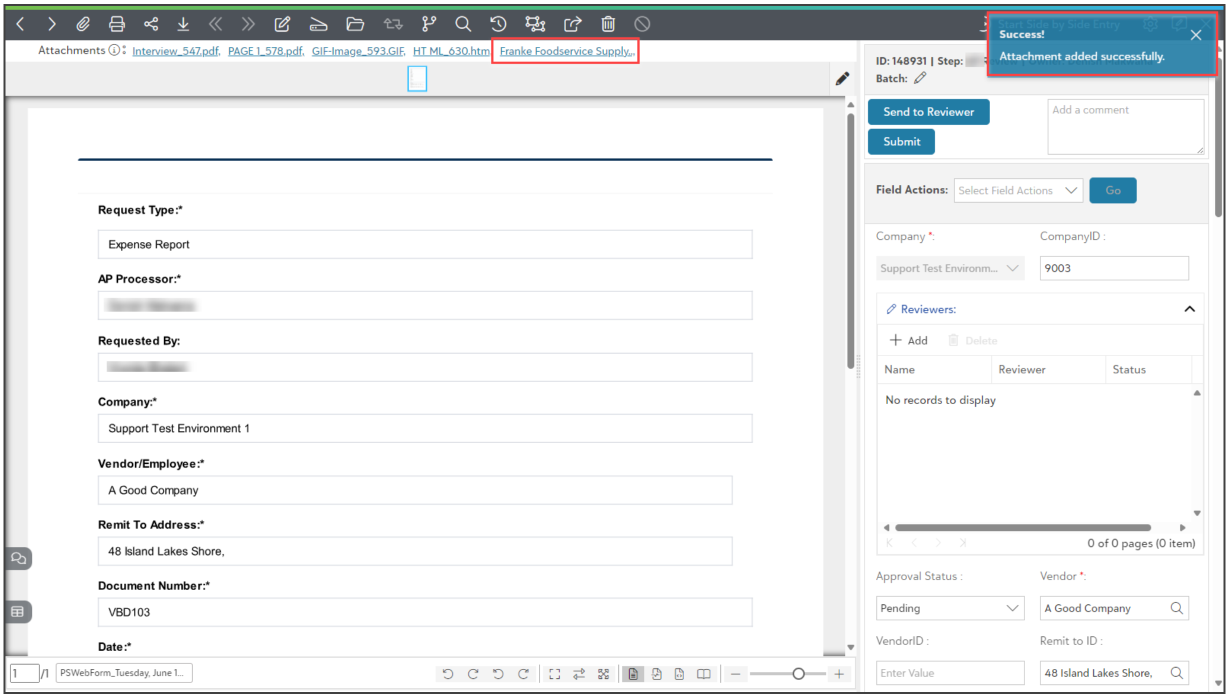
Note: This icon enables only for the submitted Smartform in a Workflow item viewer.



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.

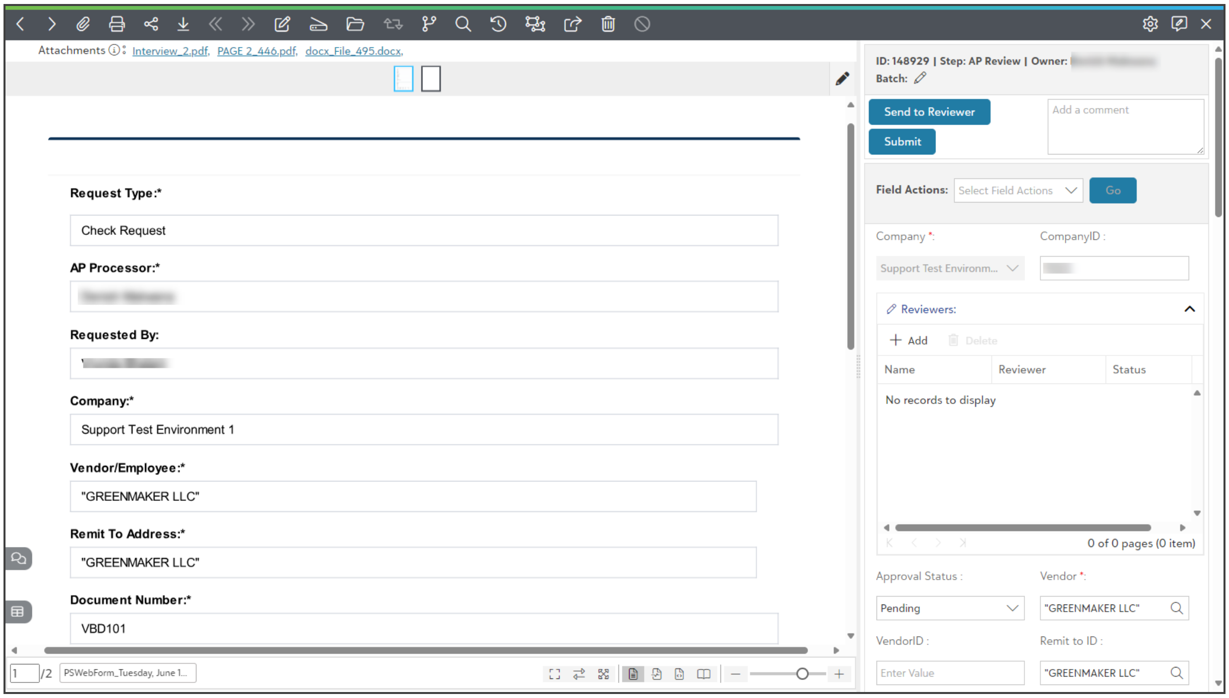


4) When your attachment is added successfully, a success toast notification appears on the top-right corner of the screen and the attachment appears within the Attachments section as shown below. If it fails, a failure toast notification appears.



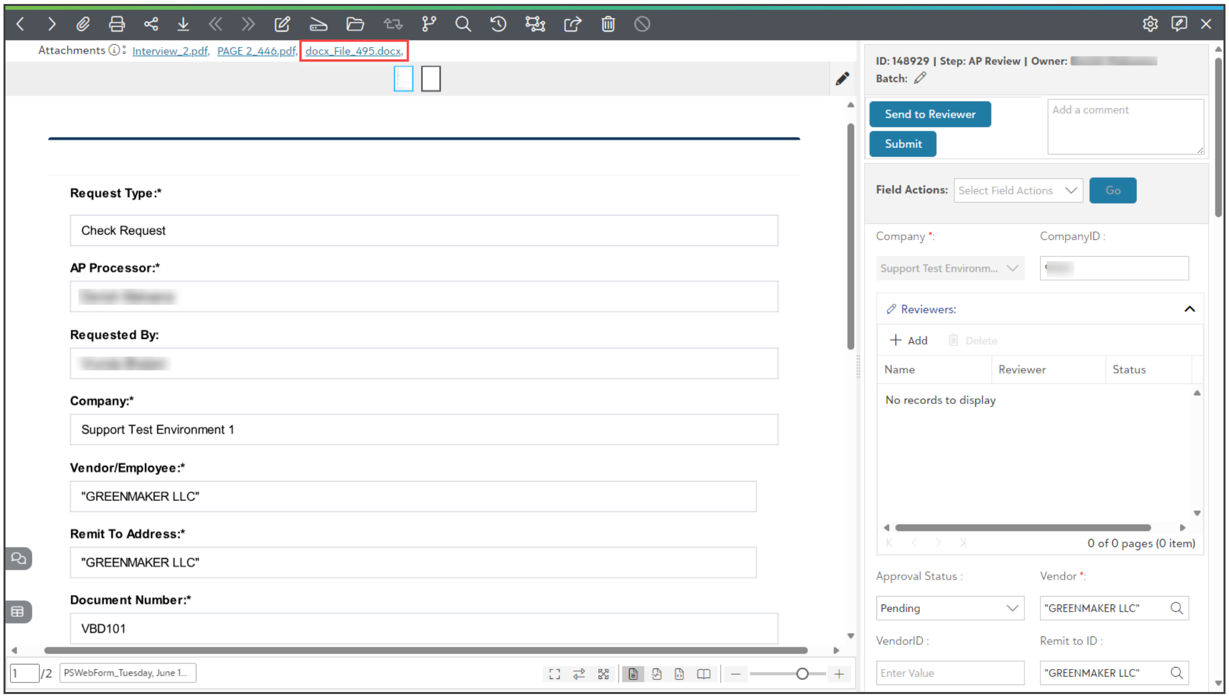
Viewing the Attachments

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.

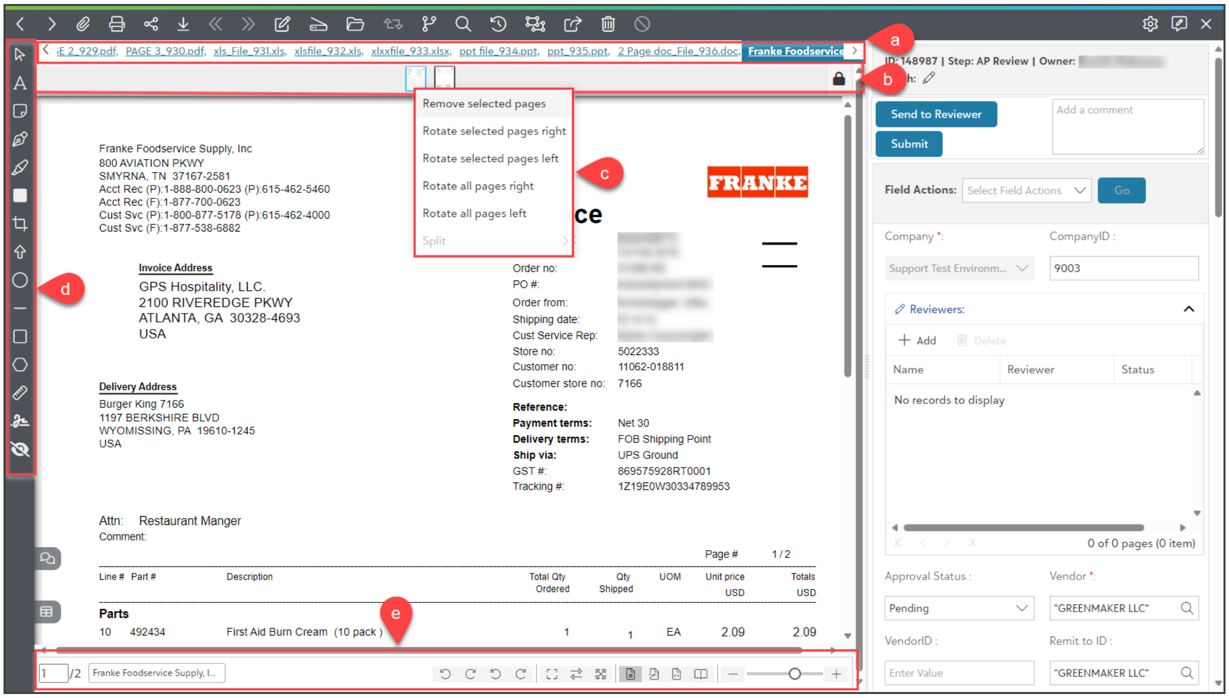


> **Note:** In this toolbar, only the following options remain enabled in the Workflow item viewer when you open the Smartform item:
>
> *a. Item navigation options (previous/next arrow):* It allows you to navigate to the previous or next item in the Workflow item list.
> *b. Add Attachment:* It allows 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.



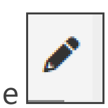
3) The opened attachment gets highlighted as shown in the "a" point in the below image. Here, you can perform various operations on attachment using the options available within the below-highlighted sections.



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.

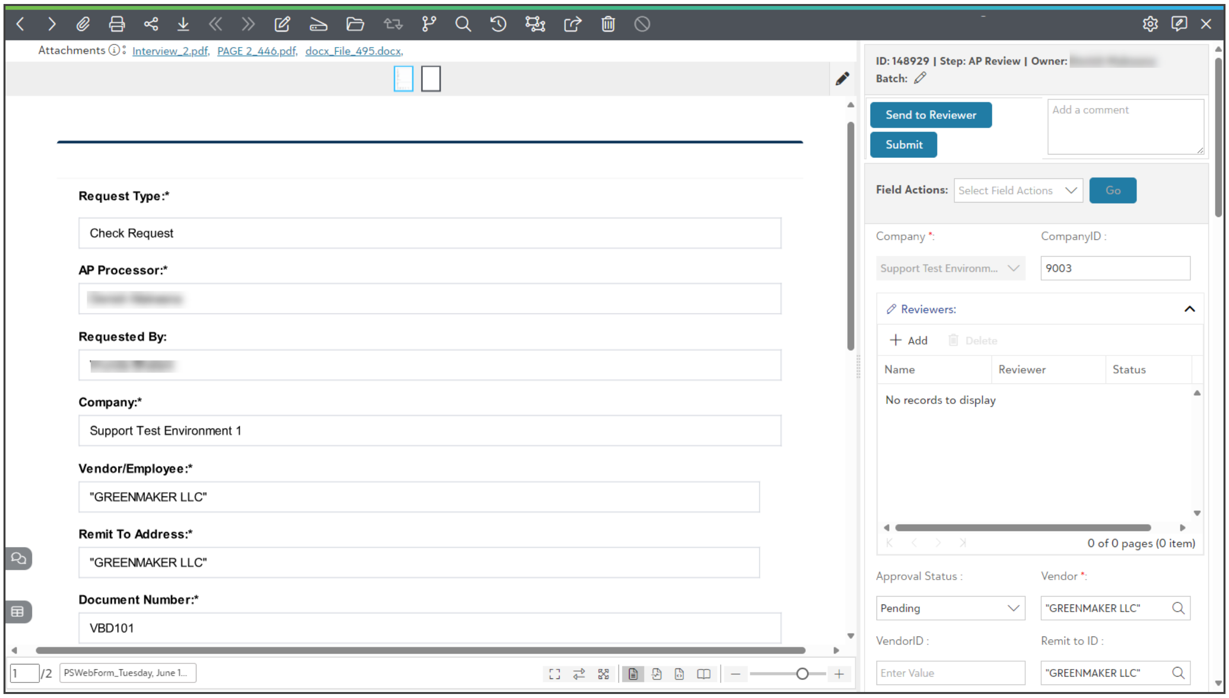
vi) Split: This option remains disabled for the Smartform item.

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.

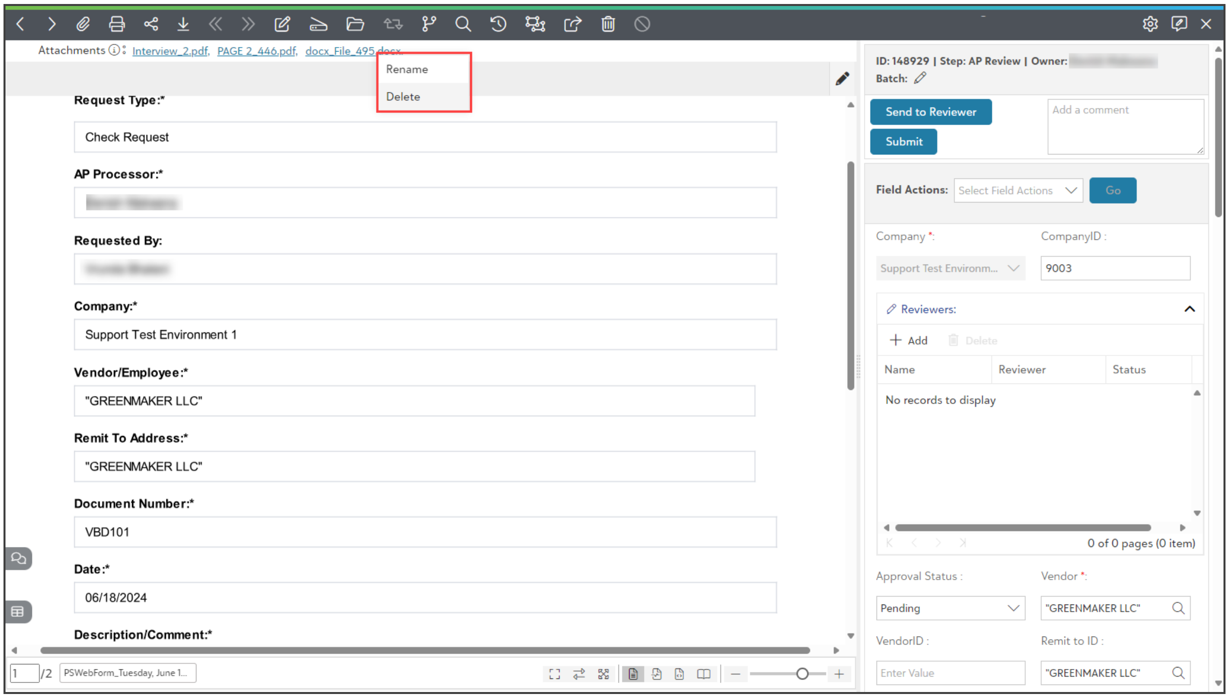
e) Content Display options: The status bar in the Workflow item viewer allows you to control your preference around document display. Refer to this page to know more about it.

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.



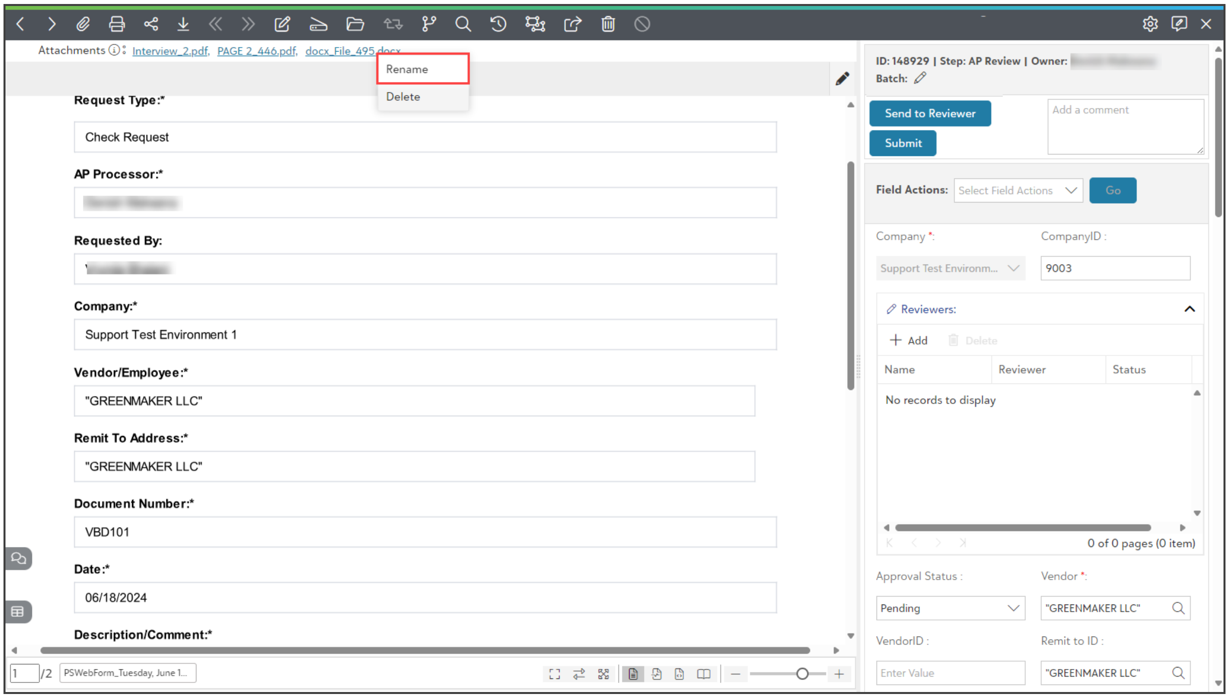
2) Right-click on the desired attachment in the Attachments section to view the menu with the **Rename** and **Delete** options as shown below.



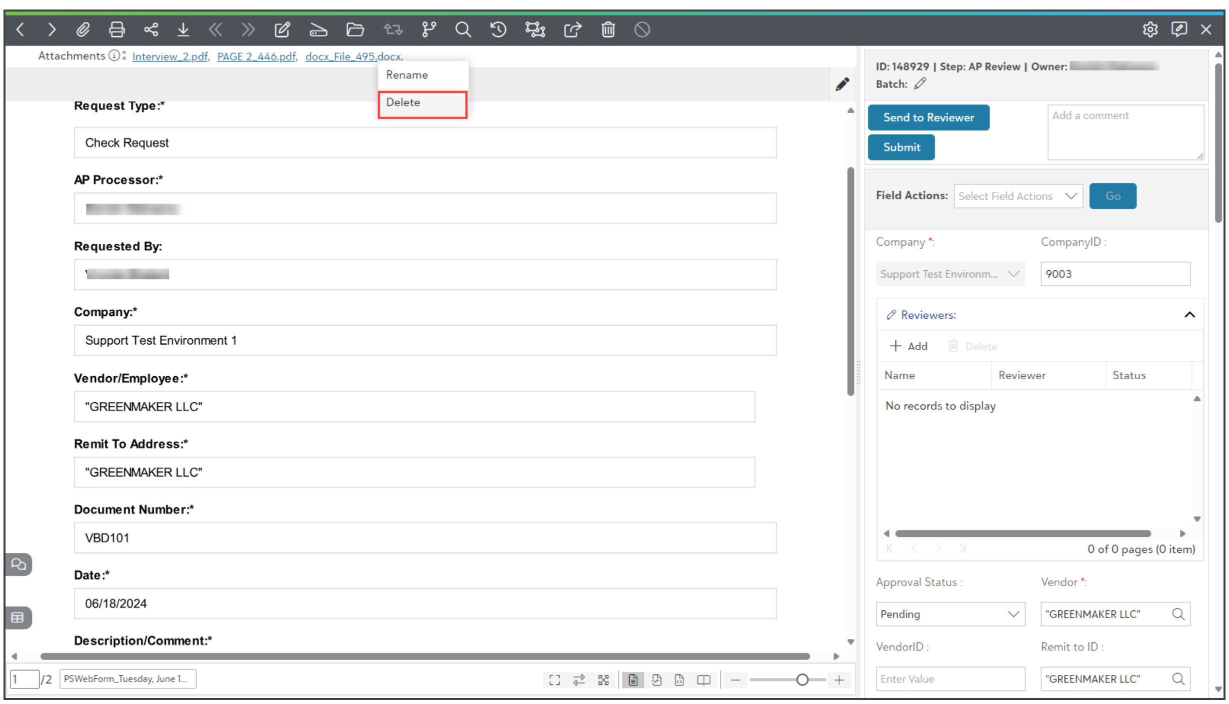
3) Now, click on the desired option from the menu.

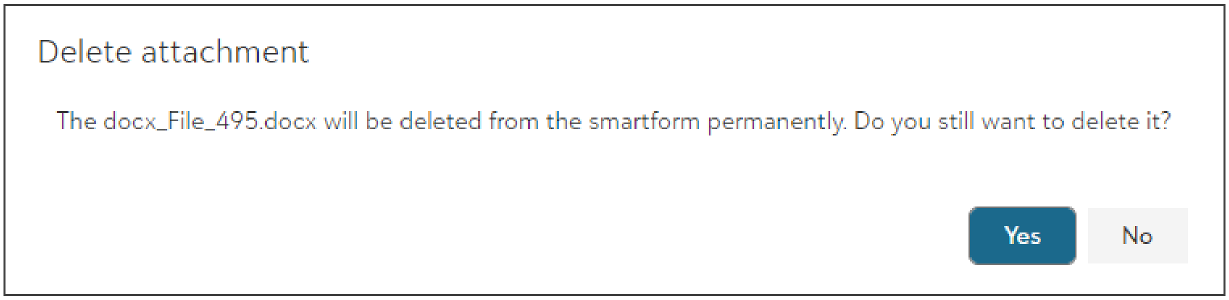
a) When you select "**Rename**" option, it allows you to update the name of the Attachment.

> **Note:** Currently, the Rename option is under implementation. Hence on clicking Rename option, "Coming Soon" message dialog box appears on the screen.

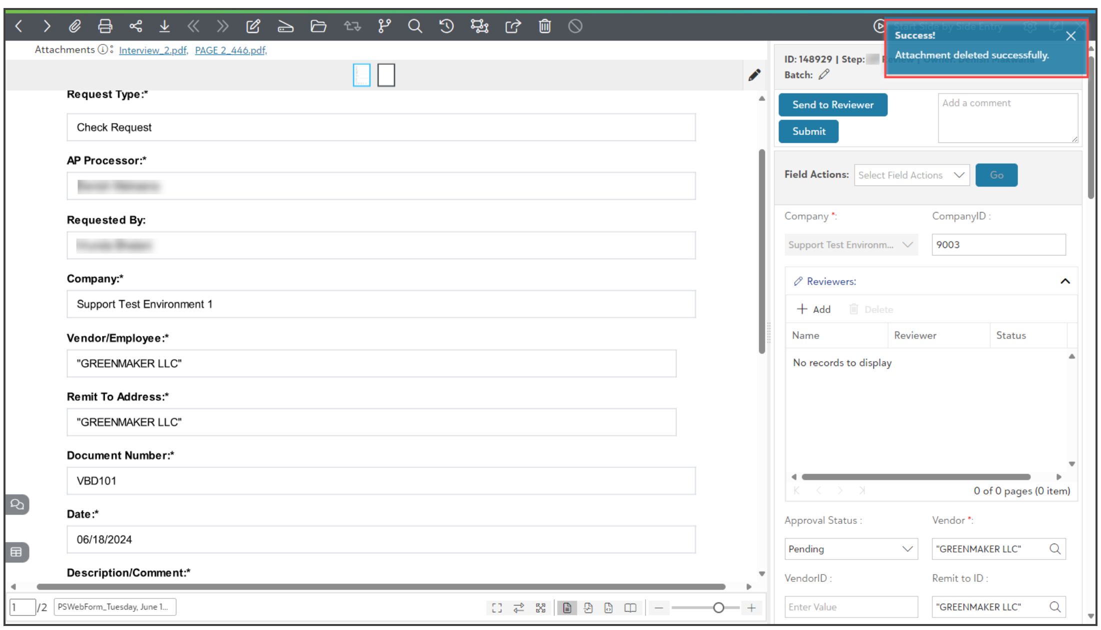


b) When you select "**Delete**" option, the confirmation dialog box appears on the screen.





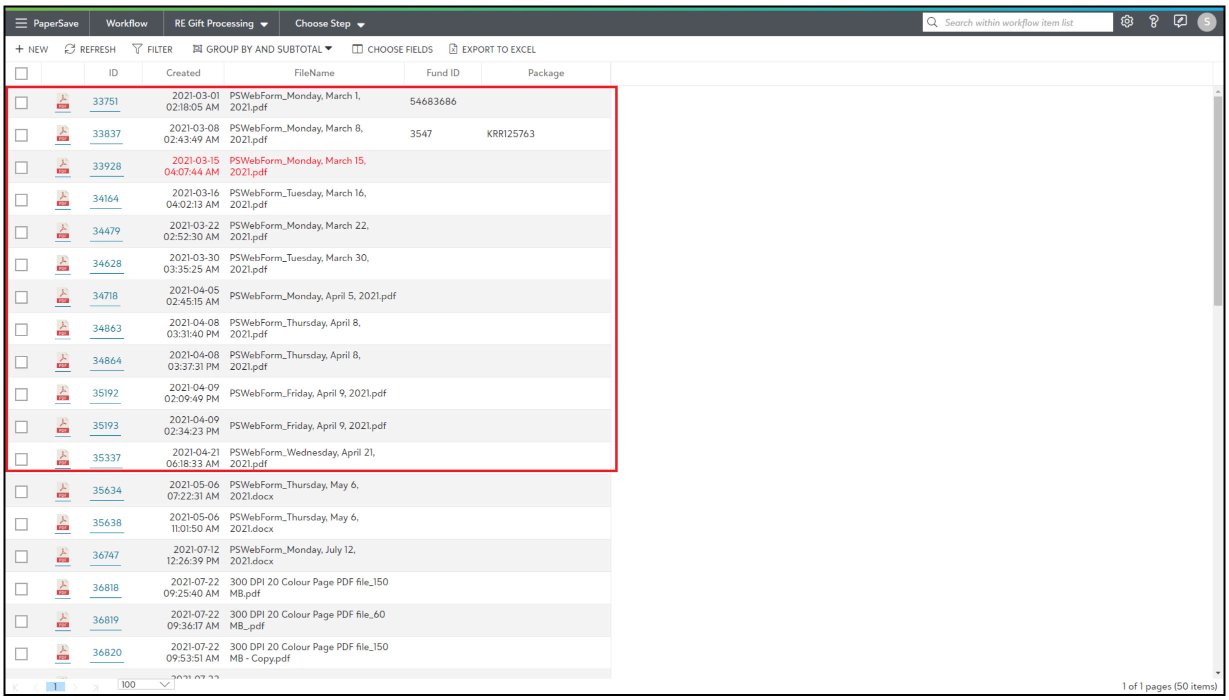
- On clicking **Yes**, the attachment gets deleted, and a success toast notification appears on the top-right corner of the screen as shown below.



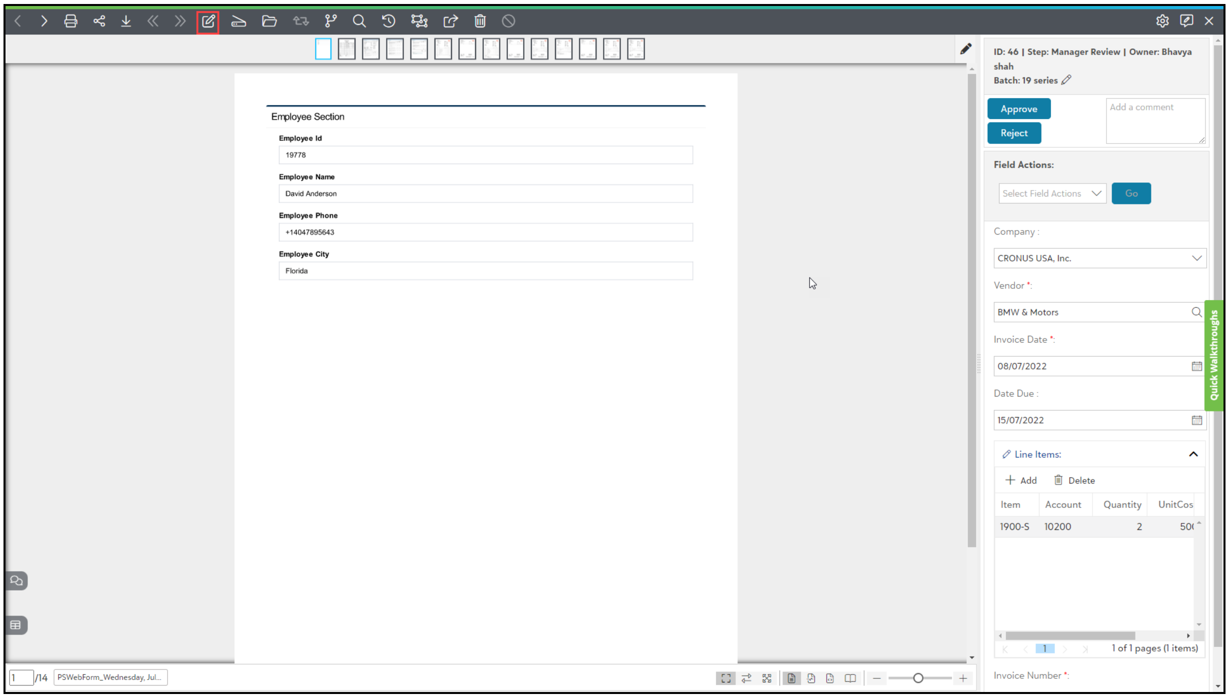
Modifying the Smart form values

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.

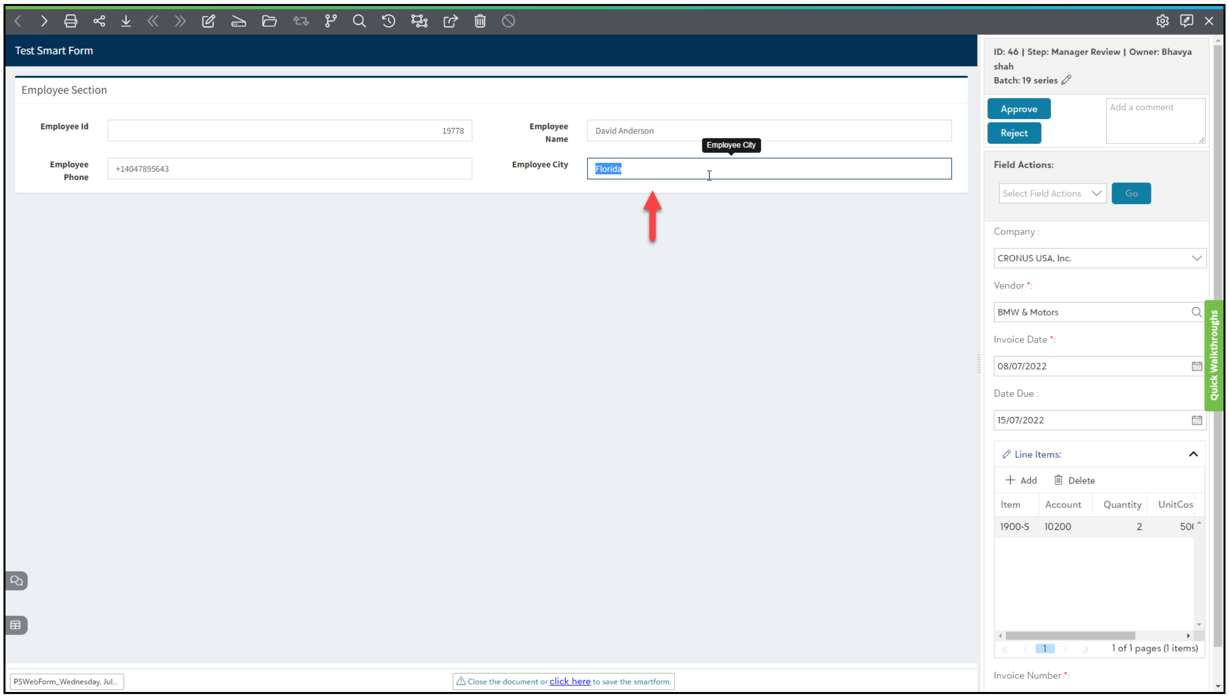
1) **Navigate** to the Workflow Area and **choose** the desired Workflow which contains Workflow items submitted via Smart form(s). A list of Workflow items submitted via smart form appears, as shown in the below screen.



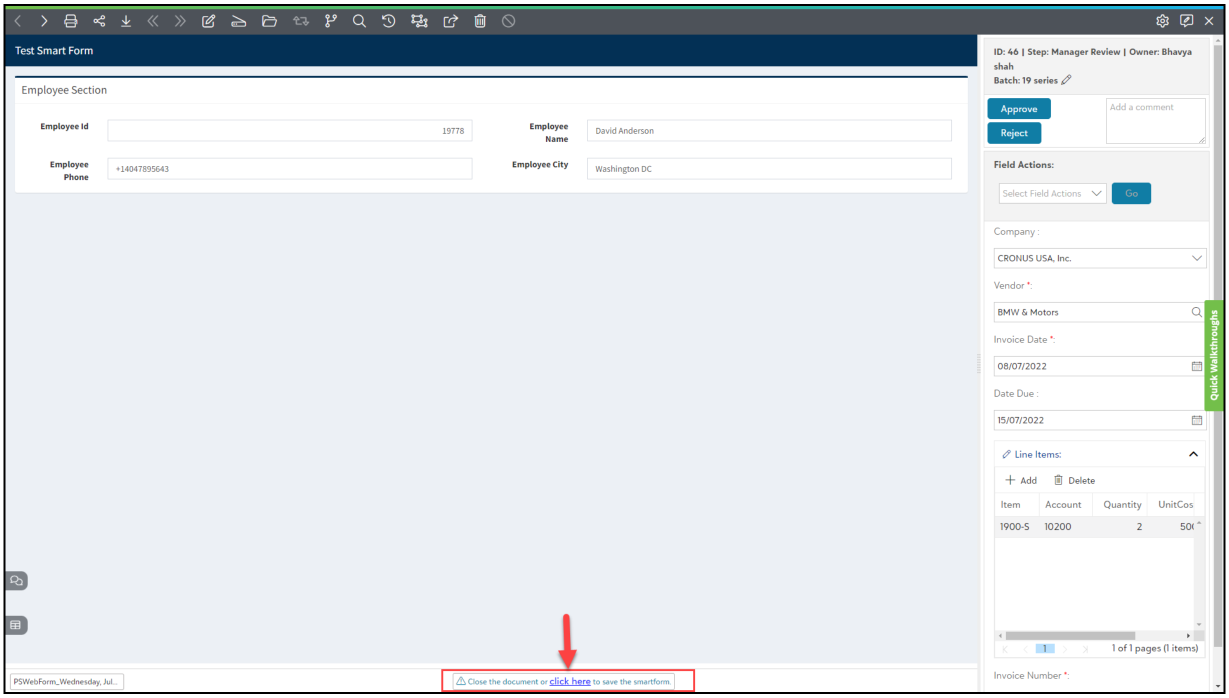
2) Once you open the item, click on Edit Form button from the top level toolbar.



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.

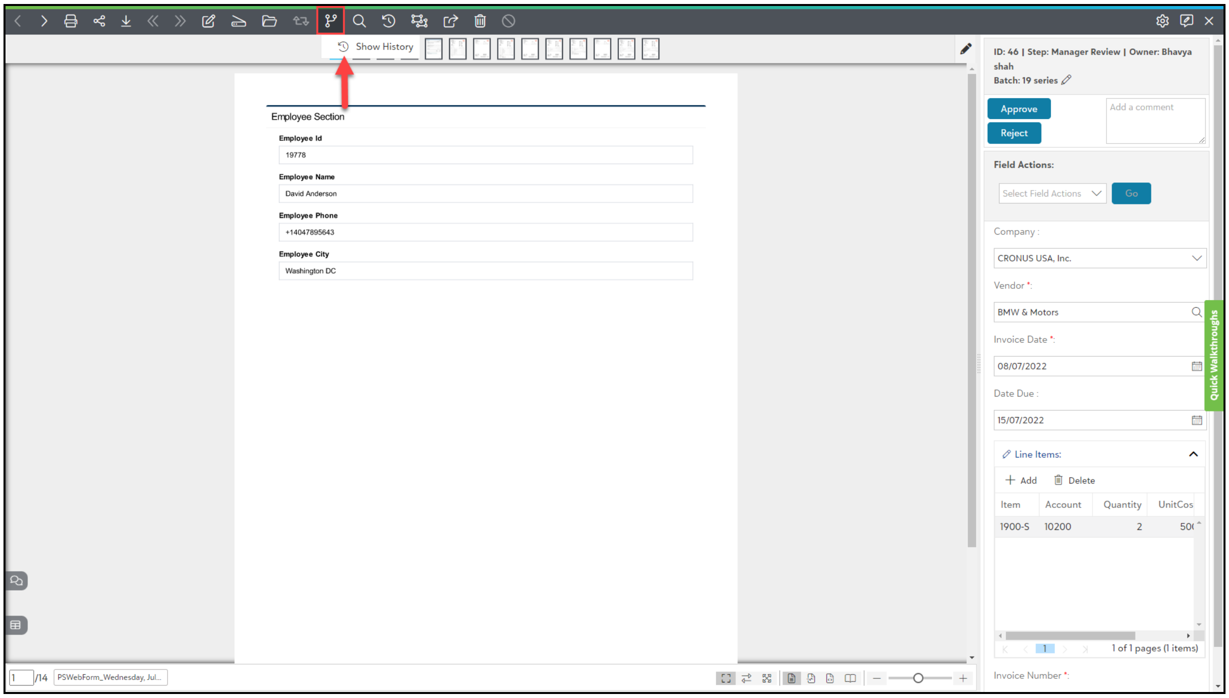


4) Now, make the changes and click on "click here" in status bar as shown below or close the document to save the smartform changes.

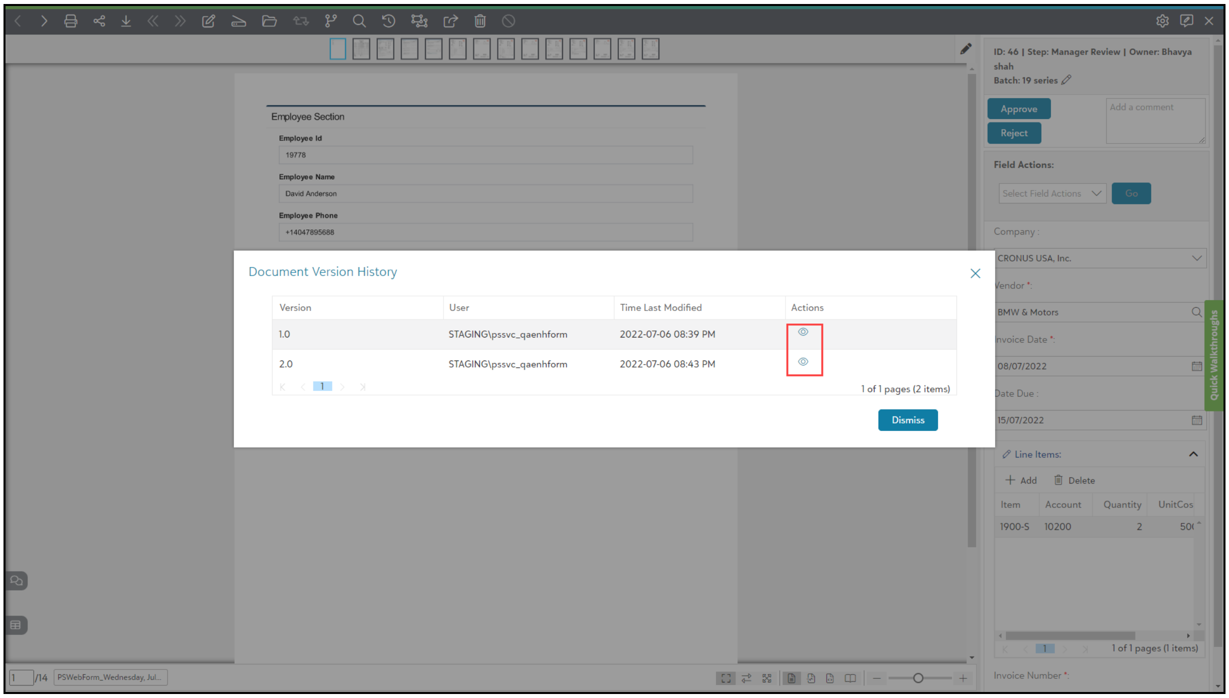


5) Once you save the changes, you return back to PaperSave 7x. Here, you can view all the changes made till now from the Version History option.

> **Note:** For Smartform, only Show History option is available under Version Control which refrains you from restoring the previous changes.

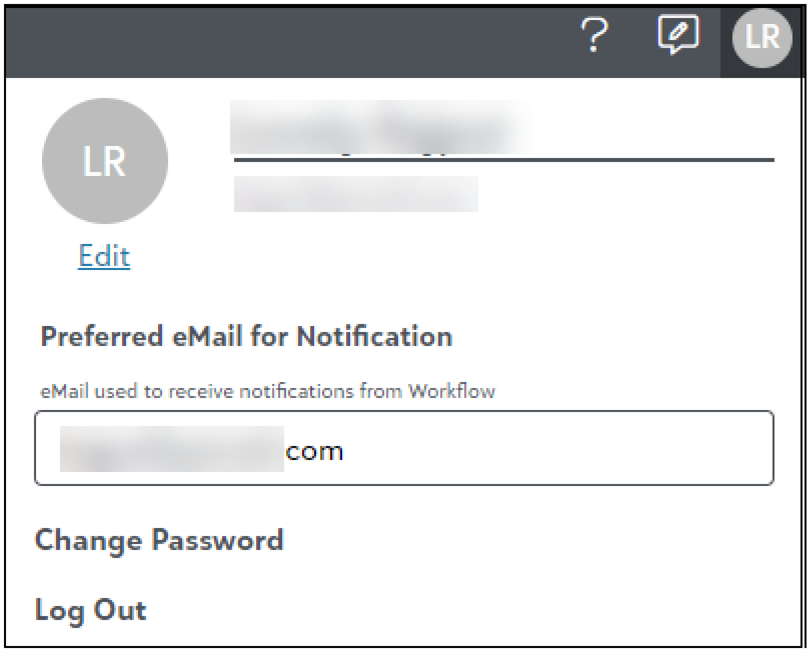


6) Now, when you click on **Show History** option and Document version history dialog box appears as shown below where you can view the previous changes by clicking on an eye icon under Actions.



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.

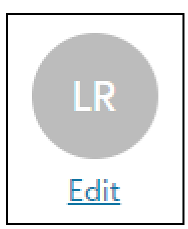


Watch the video to learn the options in the User Profile.

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:

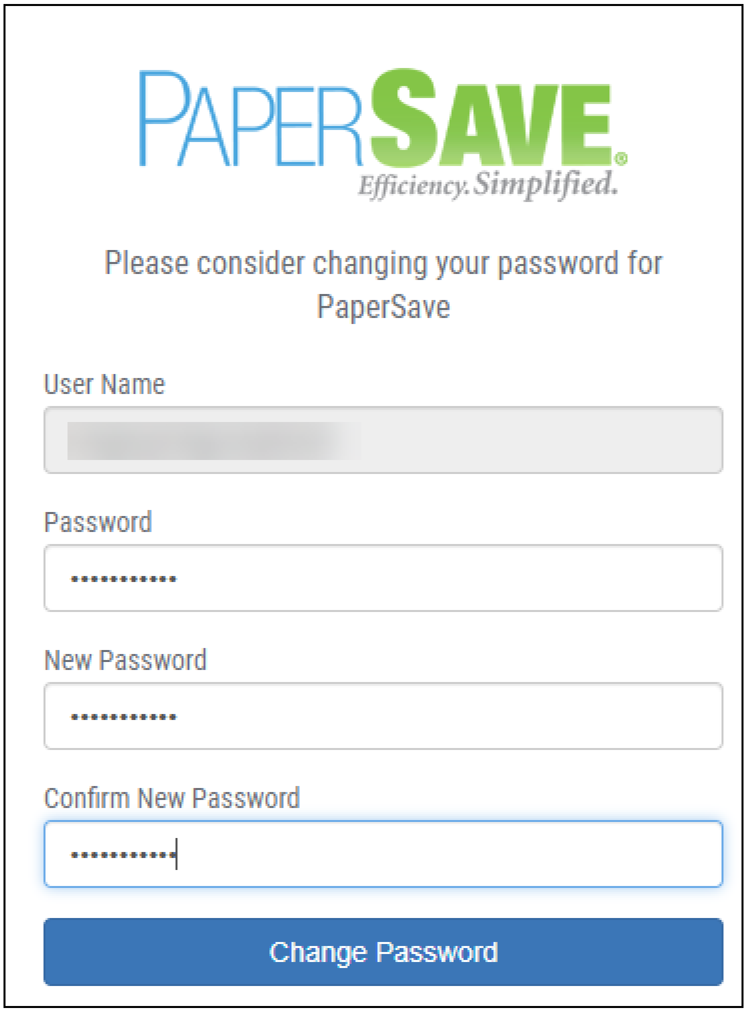
1) Click **Change Password**.

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.



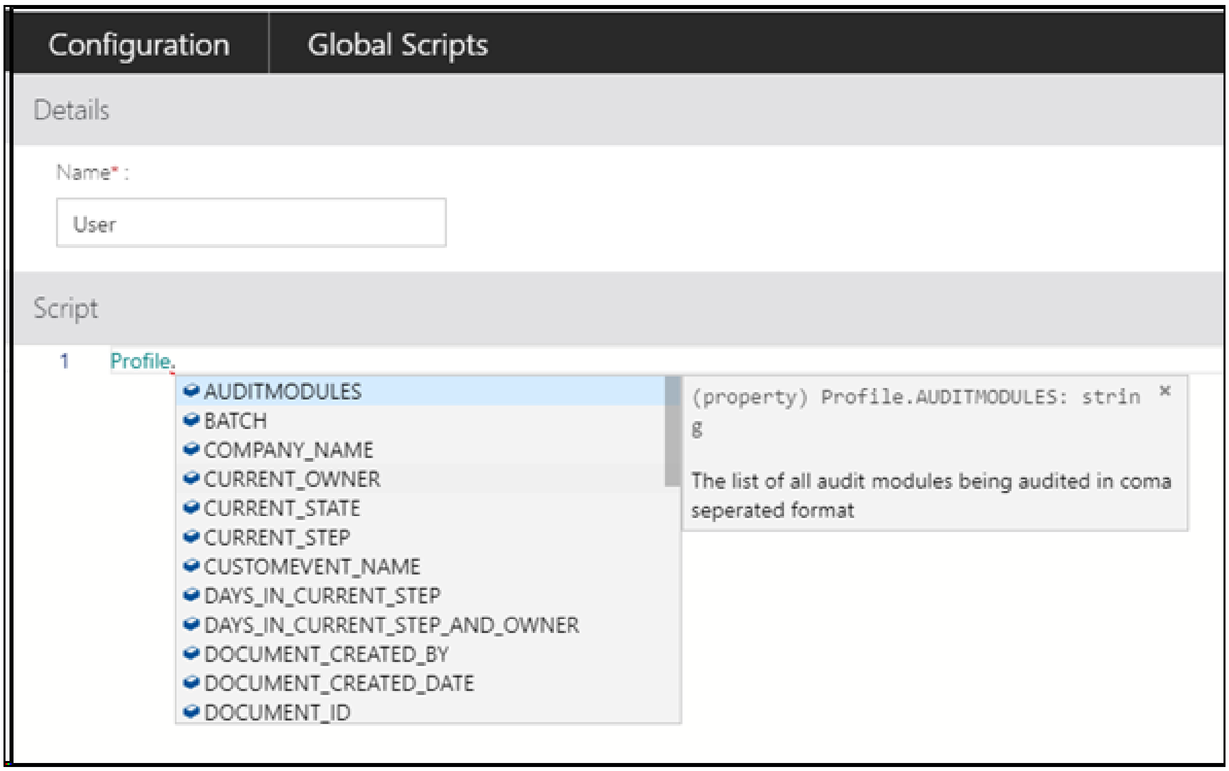
4) Log Out

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.DROPPOINT_ID	It fetches the Drop point ID for current Workflow item.
Profile.DROPPOINT_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 syntaxto return a single column value for a specific row. ResultVariable[RowIndex].ColumnName
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.

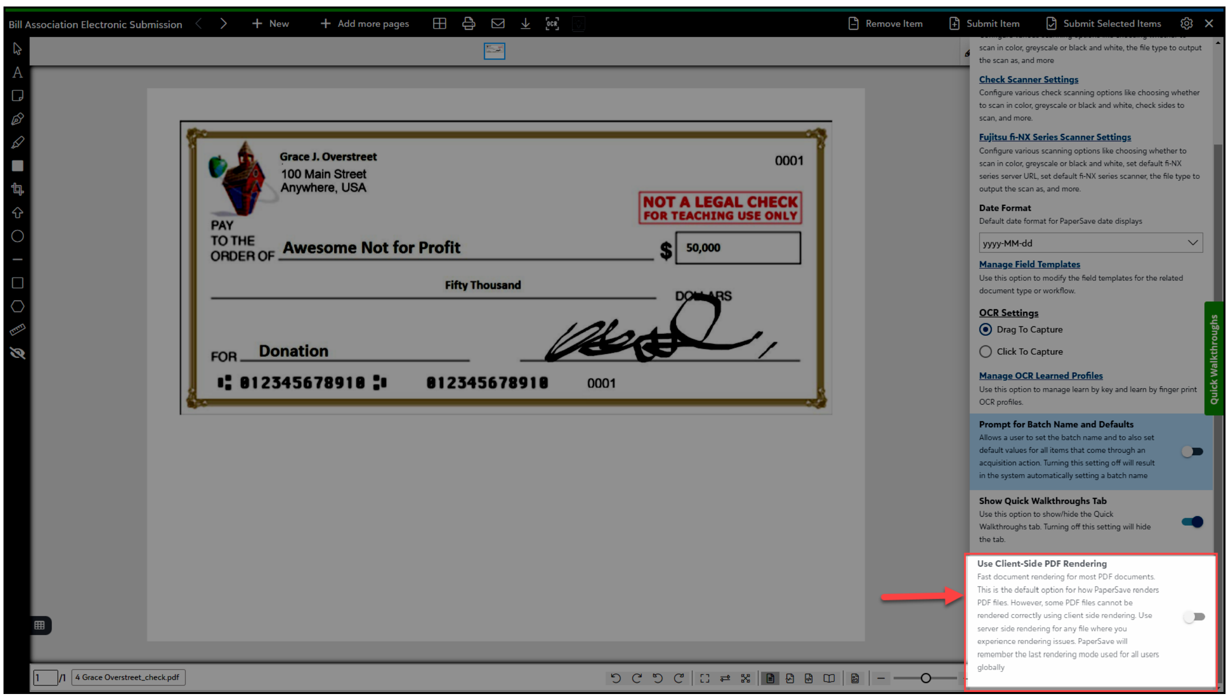
PaperSave.IncludeScript	It includes a desired script from the existing list of Global scripts.
PaperSave.Intacct	It invokes Intacct WebAPI methods.
PaperSave.IsWeb	It detects whether the script is being executed from within a web client. Returns true or false.
PaperSave.IsWindows	It detects whether the 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.

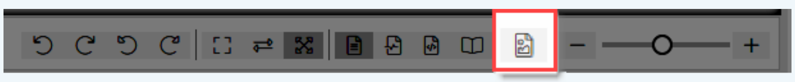
Note: The default Client-side rendering size limit is defined as 150 MB.

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:

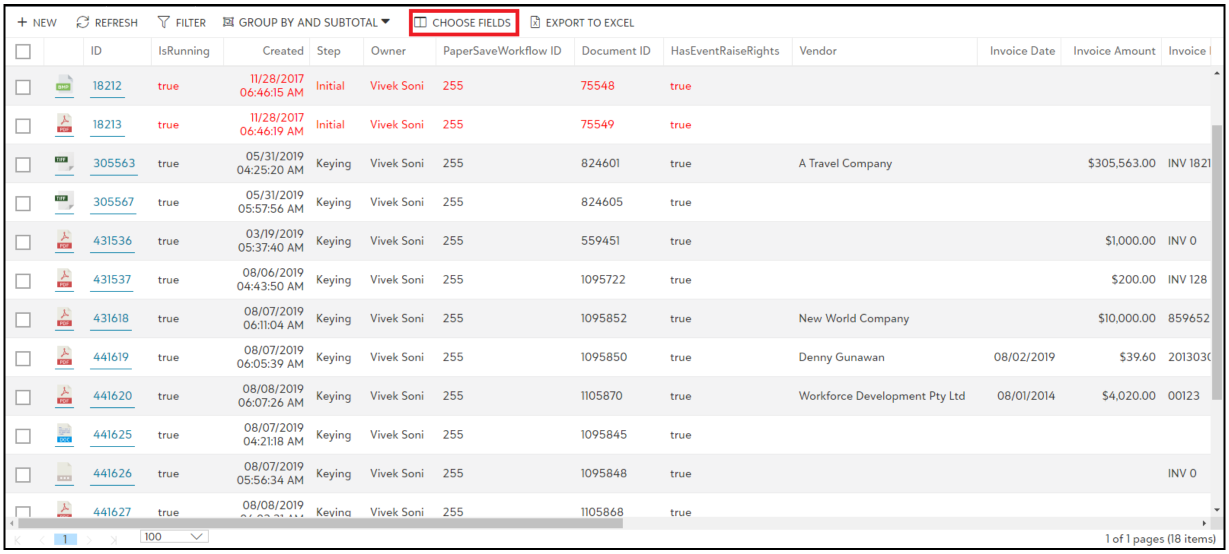
Transaction Type (Parent)	Transaction Type (Parent)
Constituent	Revenue
Constituent	Naming Opportunity
Constituent	Planned Giving
Constituent	Prospect Plan
Constituent	Interaction
Purpose	Naming Opportunity
Purpose	Revenue
Naming Opportunity	Constituent
Naming Opportunity	Revenue
Naming Opportunity	Purpose
Revenue	Purpose
Revenue	Constituent
Revenue	Naming Opportunity
Prospect Plan	Constituent
Planned Giving	Constituent
Interaction	Constituent
Interaction	Interaction

Choose Fields

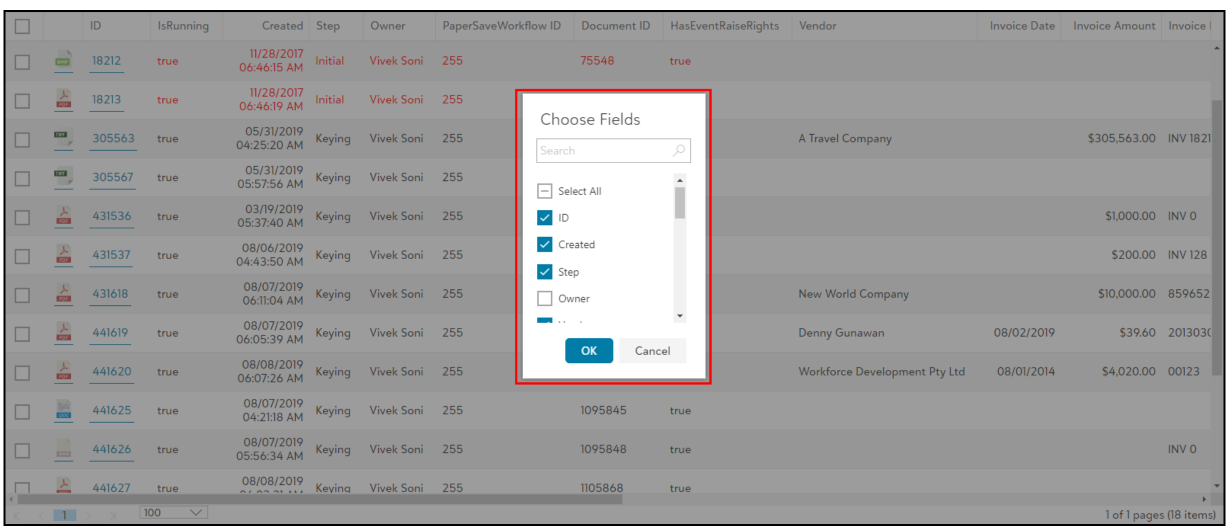
You can set your user preferences to manage what information is displayed in the list by adding or removing columns based on what’s important to you using Choose Fields.

Watch the video to learn about the Choose Fields feature.

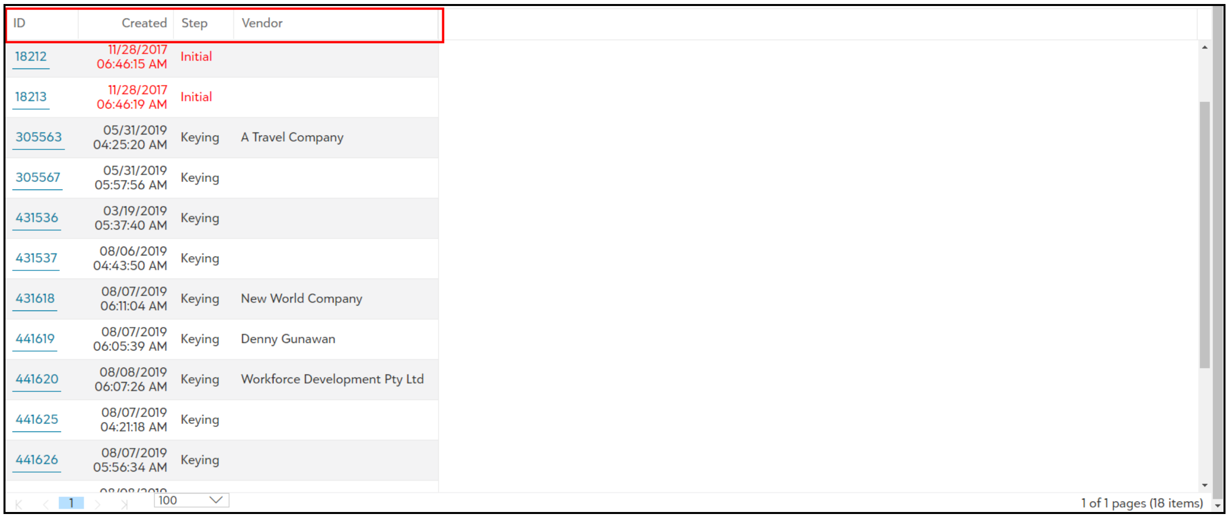
- Click on "**CHOOSE FIELDS**" option in the list toolbar as shown in the below screen.



- 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.



- 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.



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"

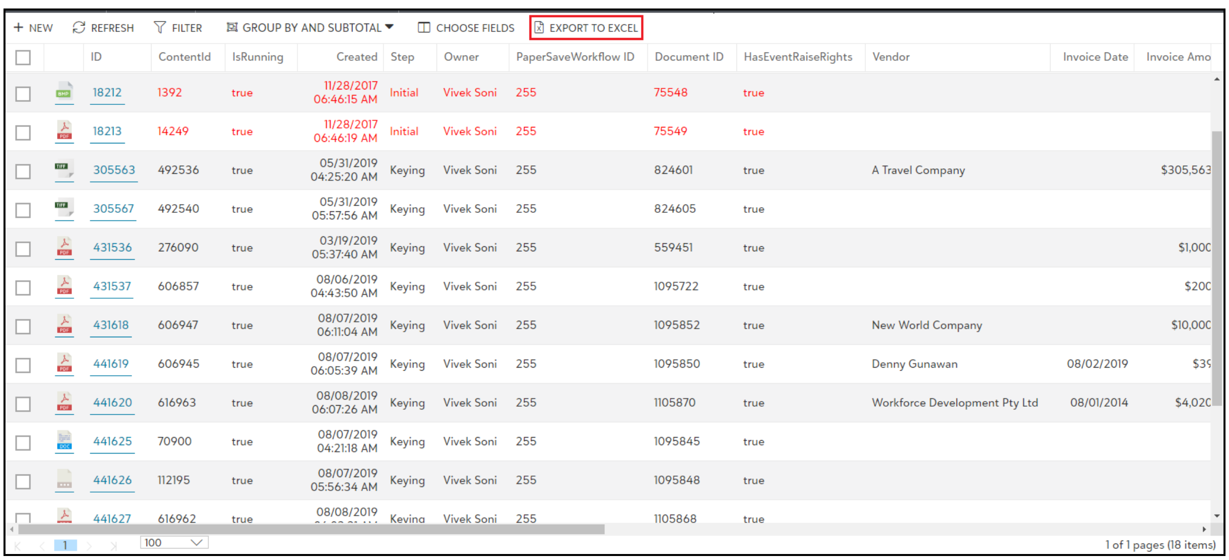
Click "**X**" or press "**Esc**" **to exit** the choose fields window without saving any changes.

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



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

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	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	$39
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	Keying	Vivek Soni	255	1105868	true			

1 | 100 | 1 of 1 pages (18 items)

> **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.

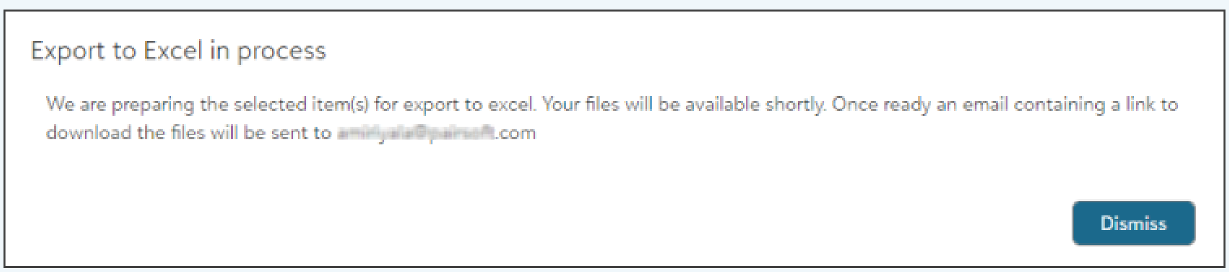
Tip: Export to Excel option is available for different modules across PaperSave. Hence, the items in the list may vary but the basic functionality of exporting the items in that particular list to an Excel file remains the same.

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.

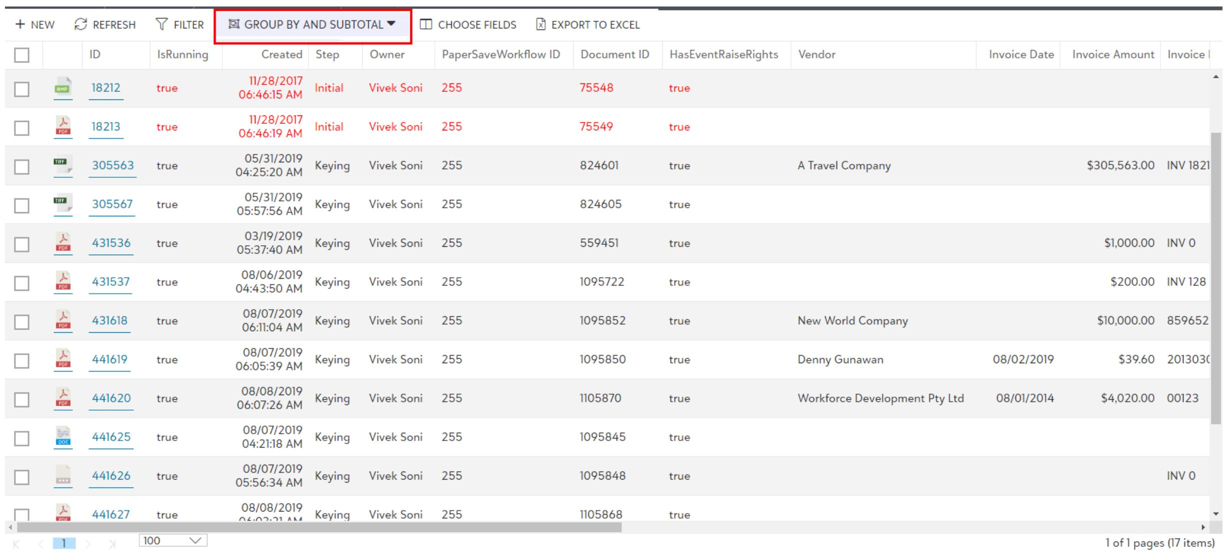


Group by and Subtotal

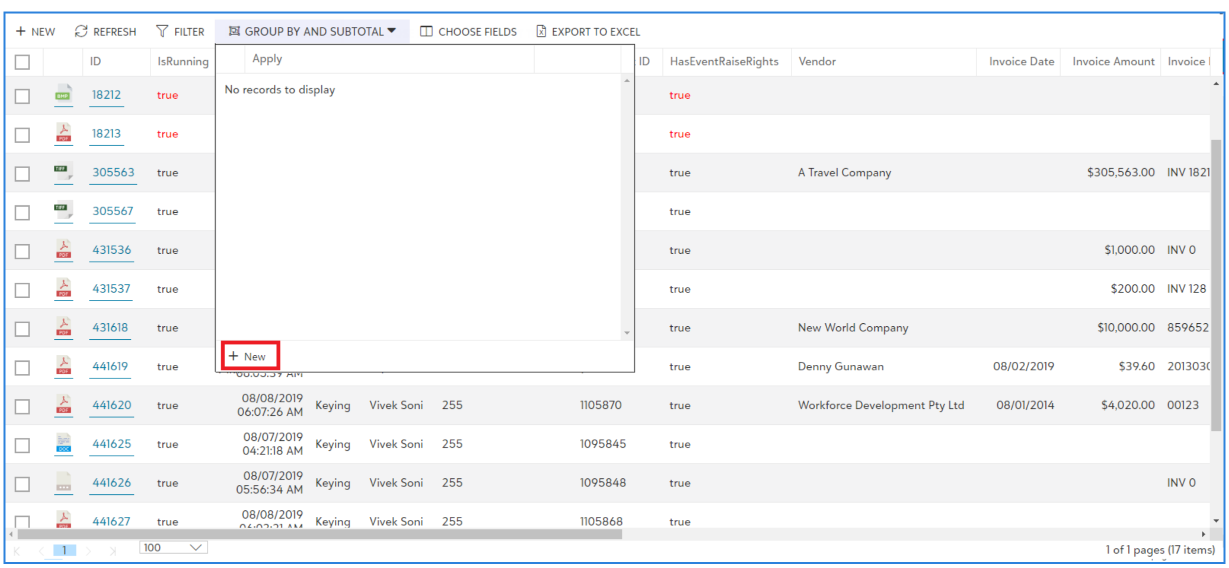
This option allows you to cluster the items in the list based on the selected header columns and get the summation of the fields configured with the data type as number.

Watch the video to learn about the Group By and SubTotal feature.

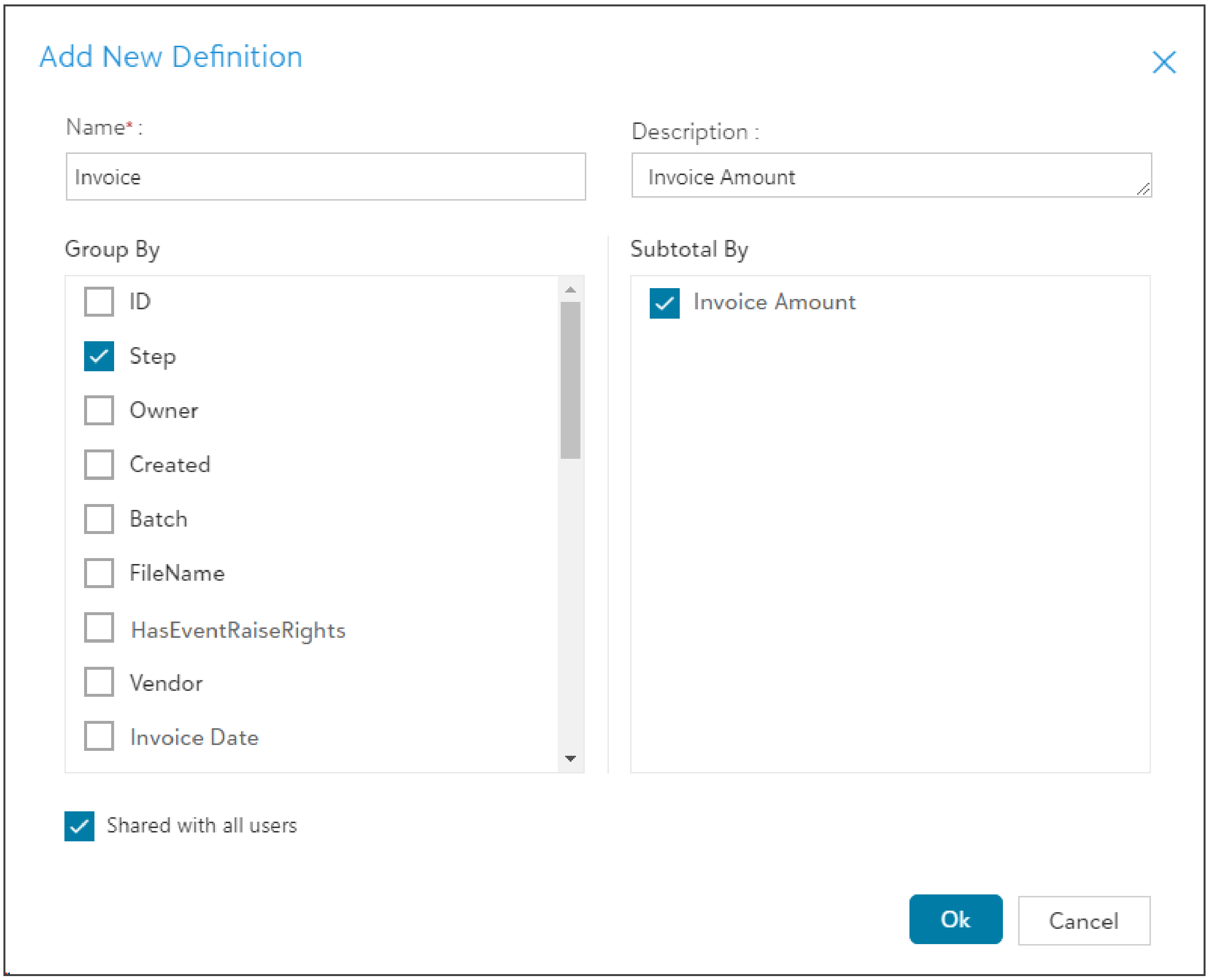
- Click on "**GROUP BY AND SUBTOTAL**" from the list toolbar as shown in the below screen.



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.

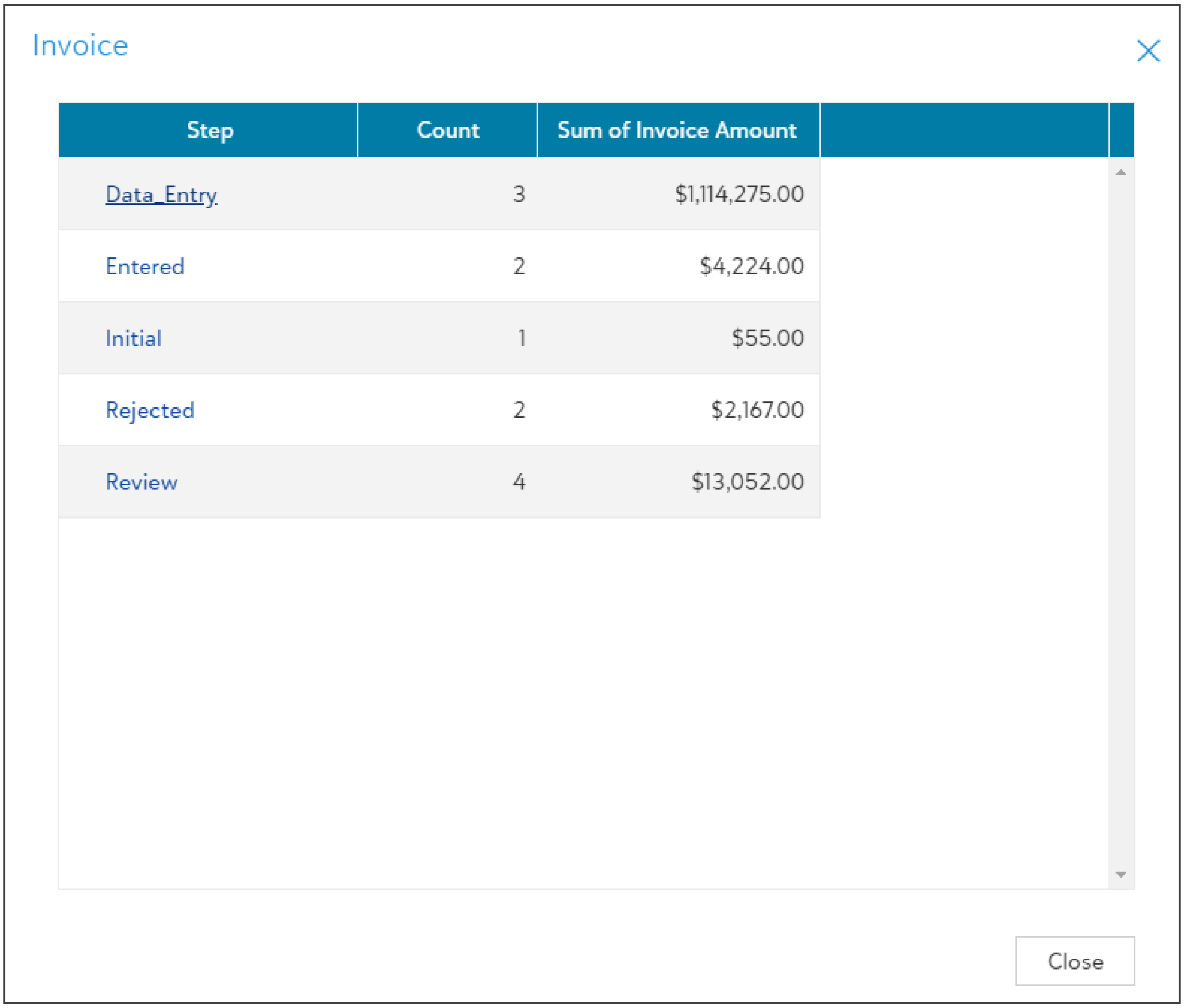


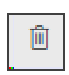
Now, enter a name and description for the new definition and select the fields to group by and subtotal. Also, you can select **Shared with all users** option to share the current 'GroupBy and Subtotal' definition with all PaperSave users.



Note: Only the definition owner can edit or delete the shared definition. Others can only view the result.

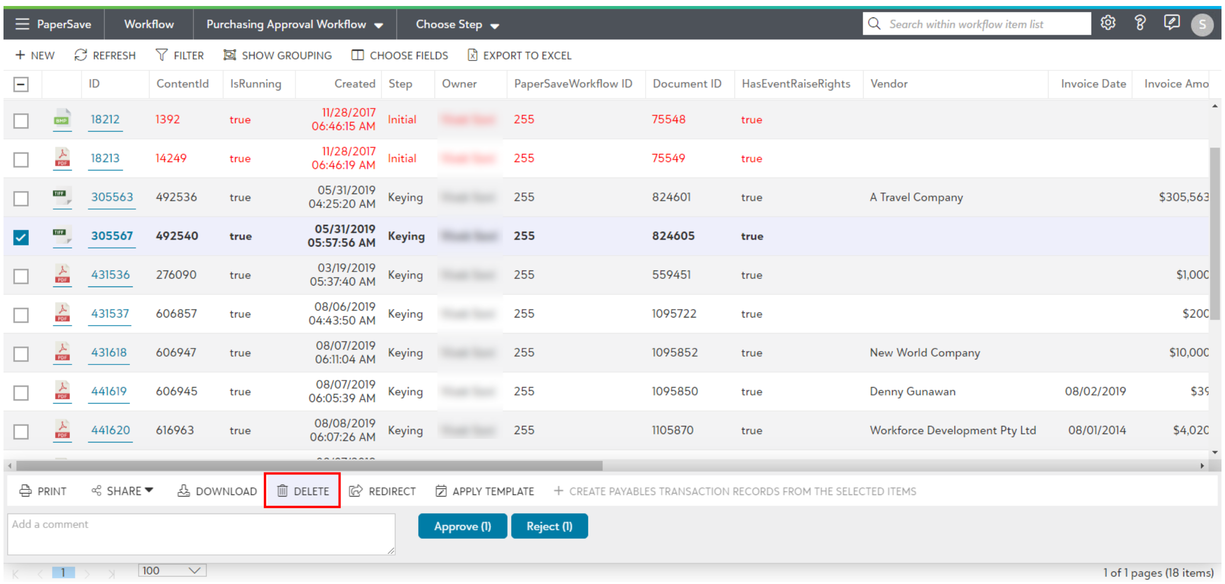
The result will be displayed based on your definition. You can click on the hyperlink to get the list of the grouped items.



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 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:

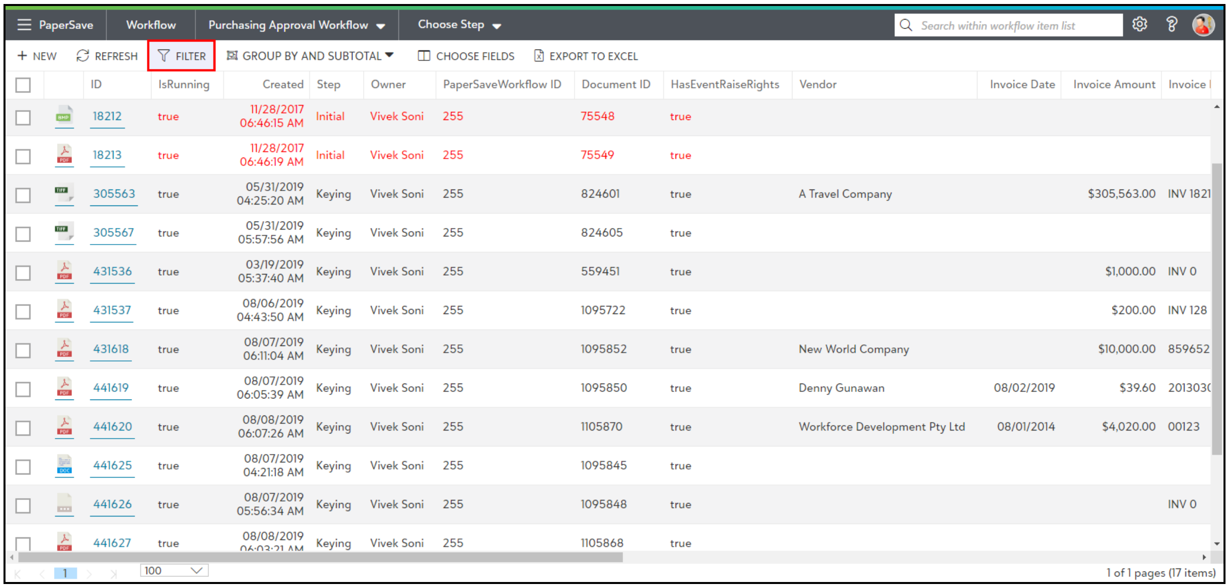
“Documents of “ + [**DOCUMENTTYPENAME**] + “ **document type** - “ + **yyyyMMDD** + “ - “ **hhmmss.-fileextension**

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.

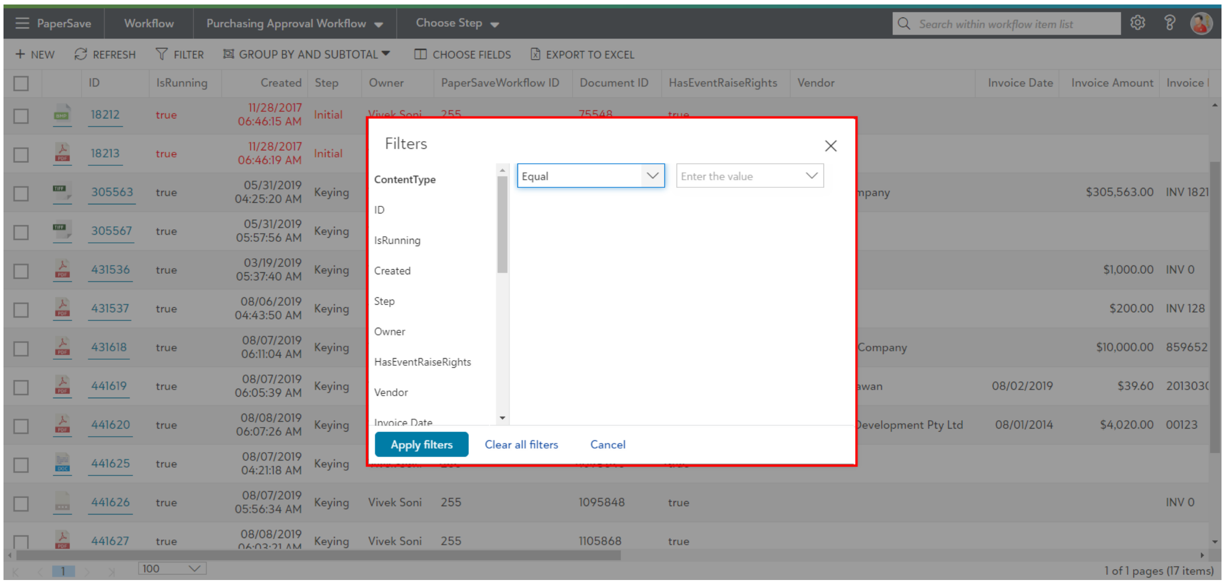


Follow the below steps to apply "**FILTER**" in the current list:

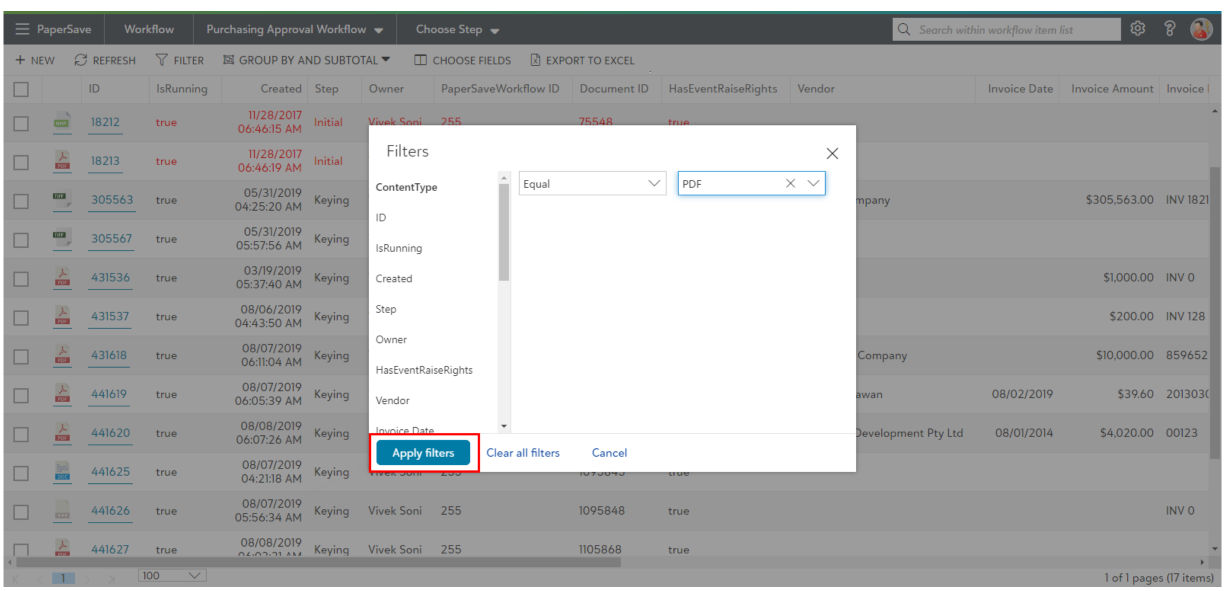
1. Click on the **"FILTER"** button in the list toolbar.
2. It shall open the "**Filters**" dialog box.
3. List of columns on which filters can be applied will appear on the left side of the dialog.
4. Set single or multiple conditions on a single or multiple columns.
    - Select the **Operator** for 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".

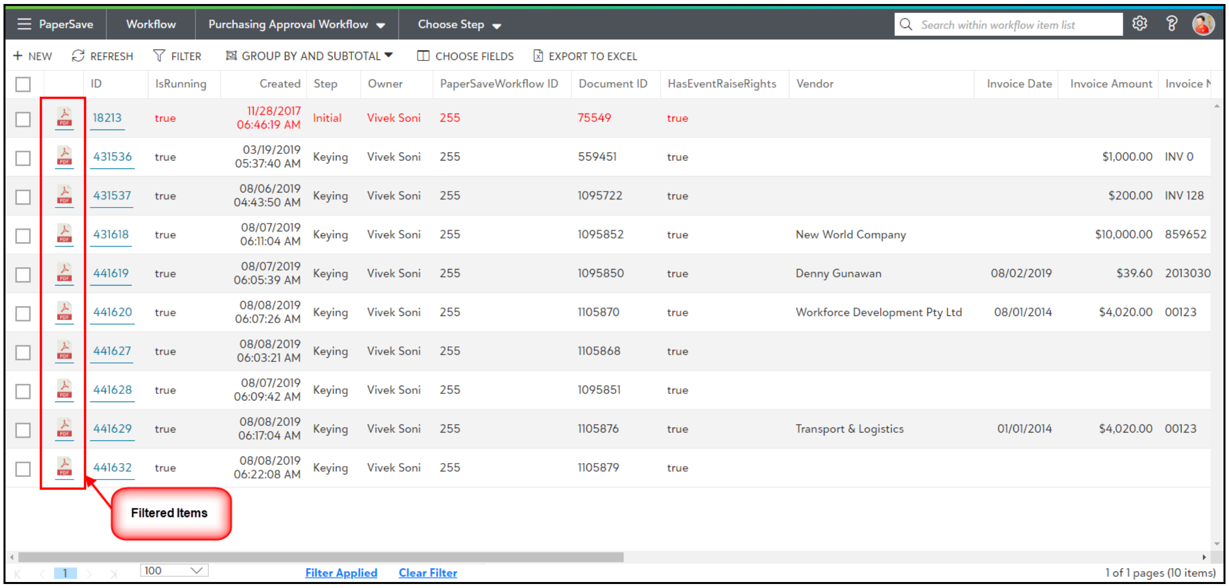
1) Click on **FILTER** button in Workflow list toolbar. This will launch the below screen.



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:



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

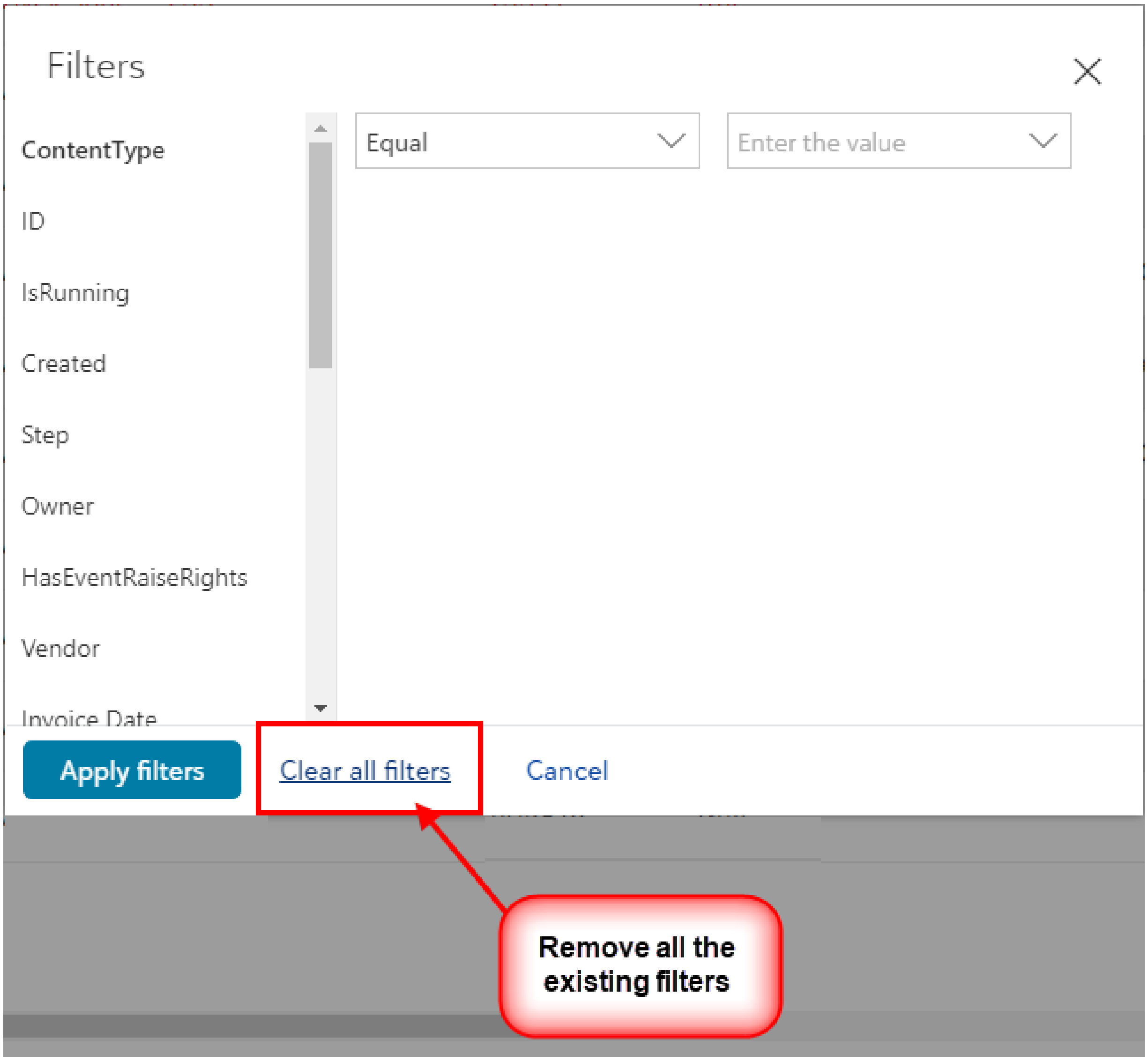
You can filter the items by putting conditions on multiple columns by first selecting the column and adding conditions to it. Then, select another column and add conditions to it and so on.

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.

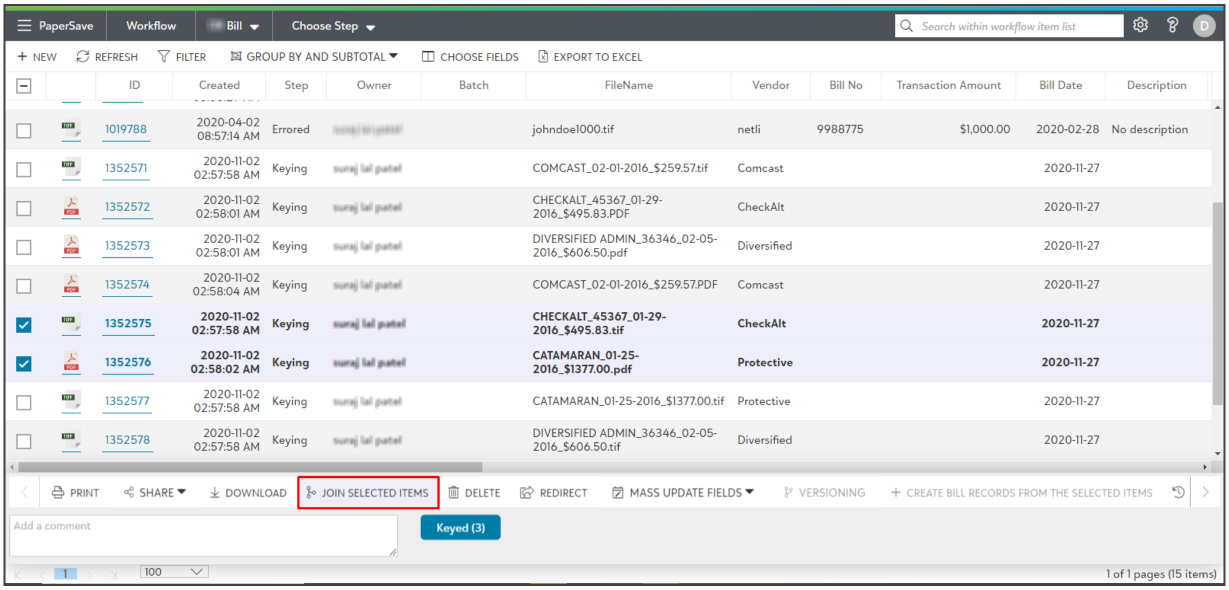
> **Note:** To perform the Join operation, you must have any of the below rights:
>
> • Edit content and delete rights on the workflow
>
> • Workflow Administrator
>
> • Super Admin

> **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.

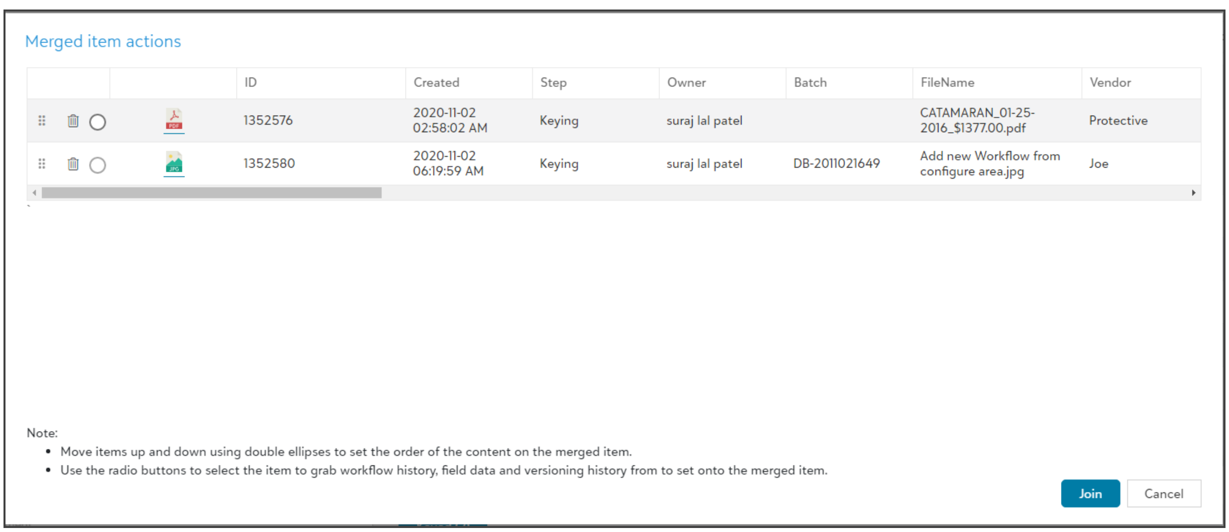
Follow the below steps to merge the workflow items from the Workflow item list:

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.

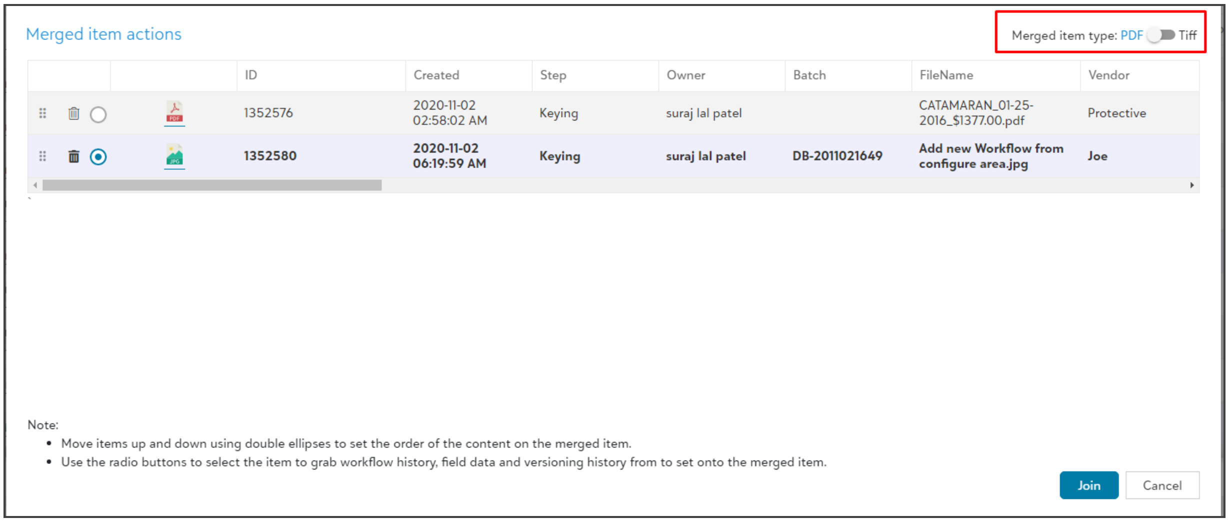


3) The "Merge item actions" dialog box will appear as shown in the below screen, where you can move items up and down using the double ellipses to set the order of the merged item's content.



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.

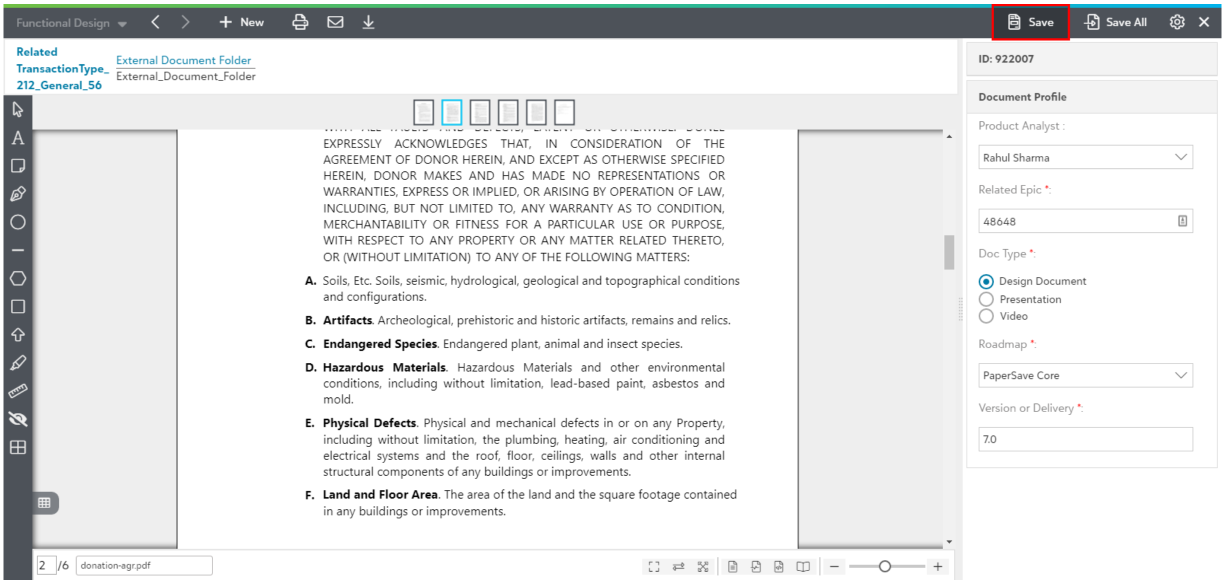


- Select Tiff from the toggle option to merge the documents with type "Tiff". Similarly, choose PDF from the toggle to merge the documents with the type "PDF".

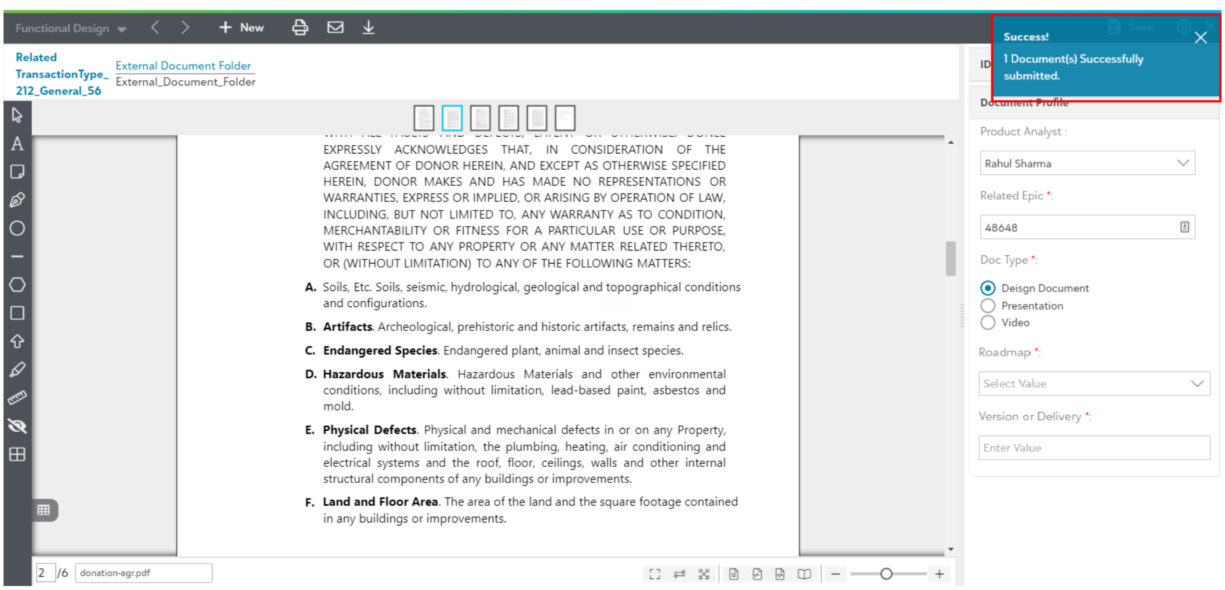
> **Note:** By default, PDF type is selected.

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:



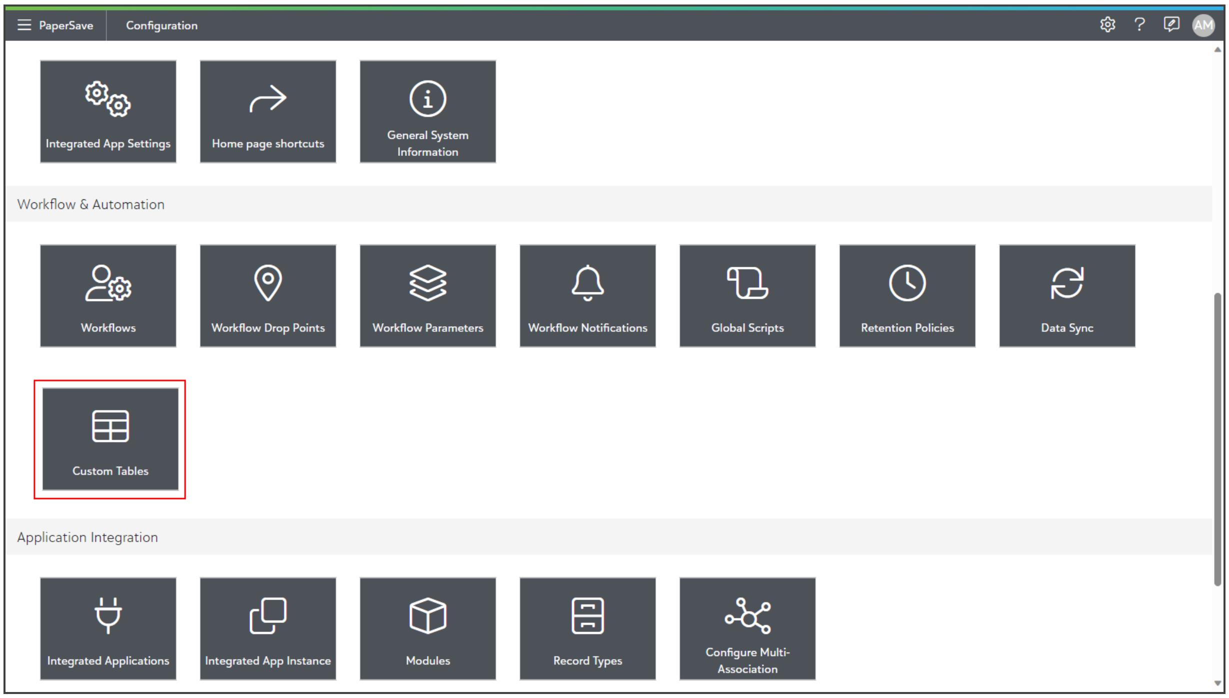
The app will display a toast notification in the top-right corner of the screen showing the submission success as shown below. Similarly, it shall display a failure notification in case of the submission failure.



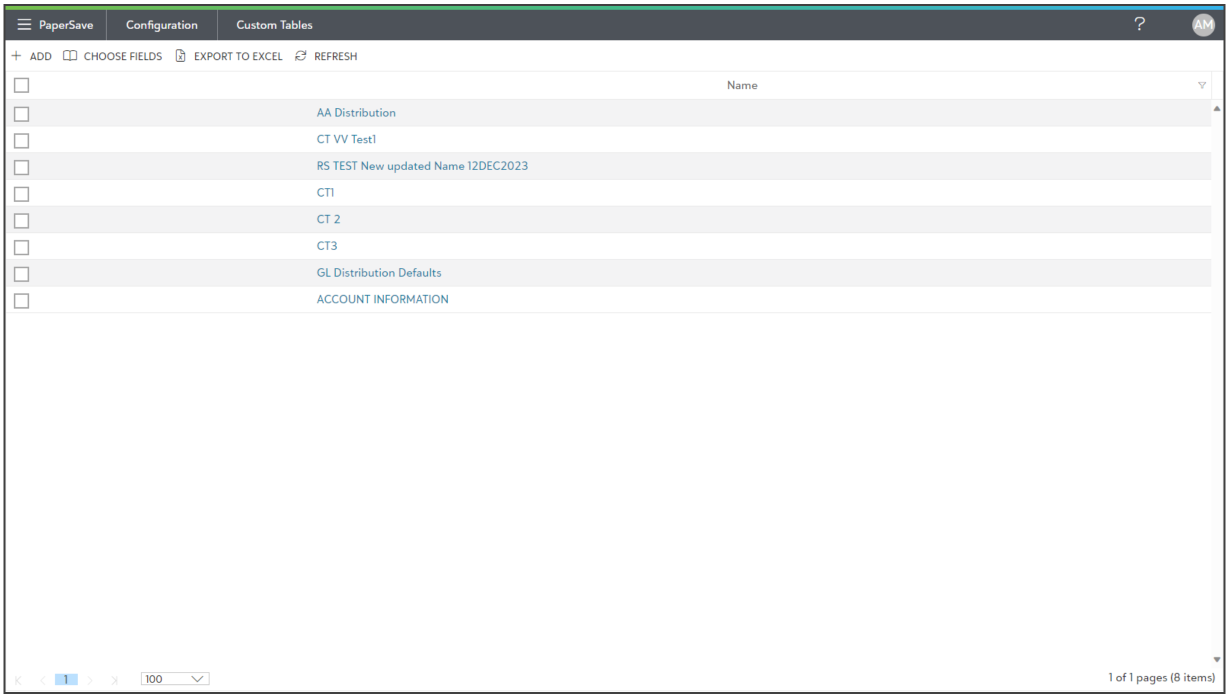
Importing rows into the Custom Tables

To import rows to the custom table, follow the below steps:

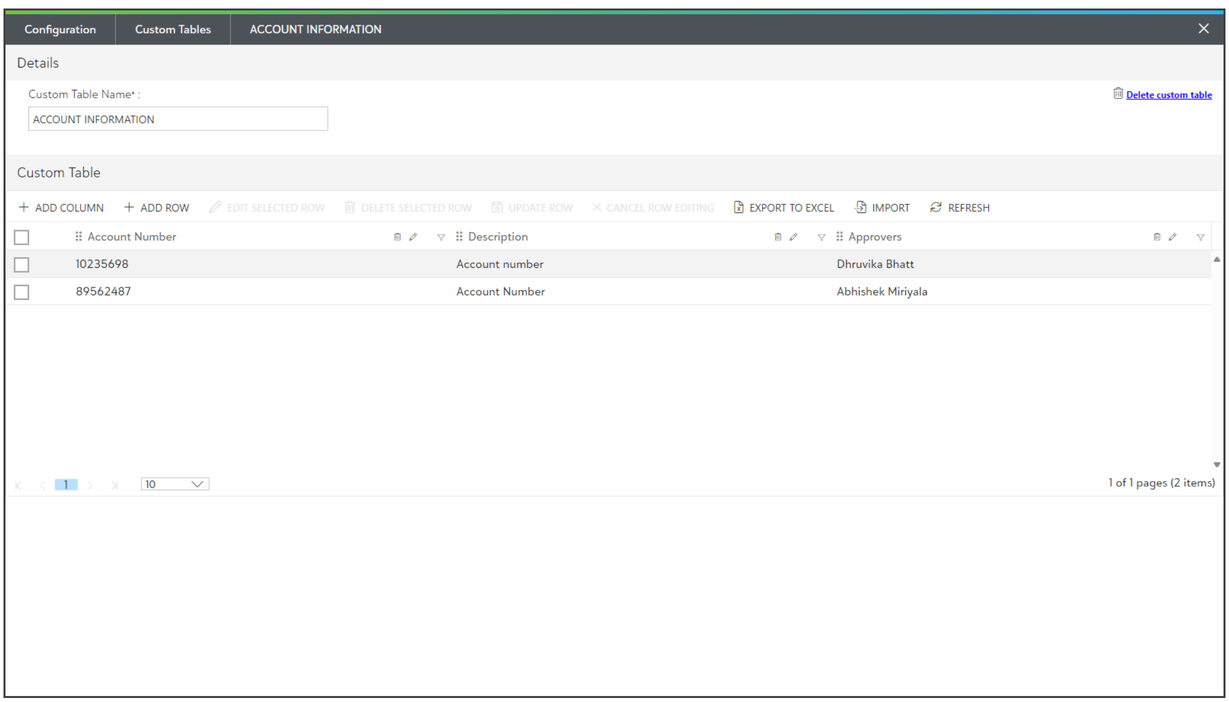
1) Click on the Custom Tables tile in the **Workflow and Automation** section of the **Configuration Area**.



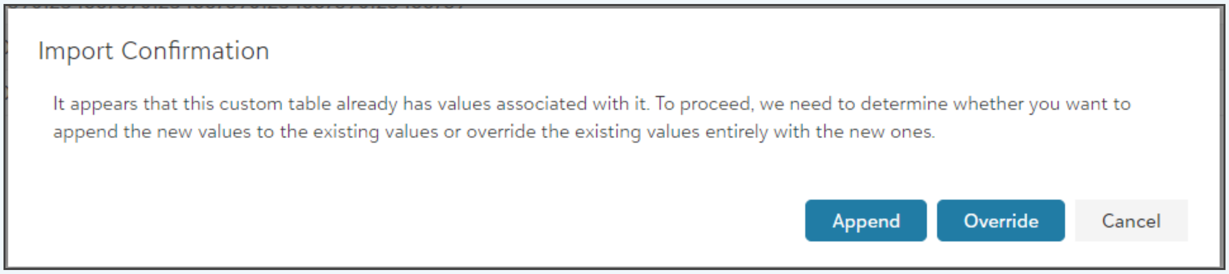
2) Now, the Custom Tables list view page opens, click on the desired custom table from the list as shown below.



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.

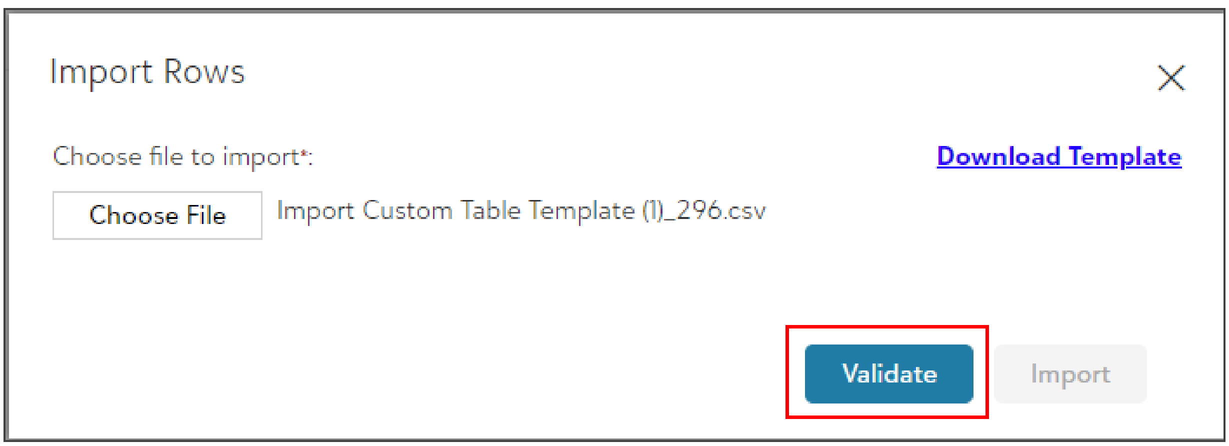
5) Now, click on the Download template to download the .CSV file, if not downloaded.

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.

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.

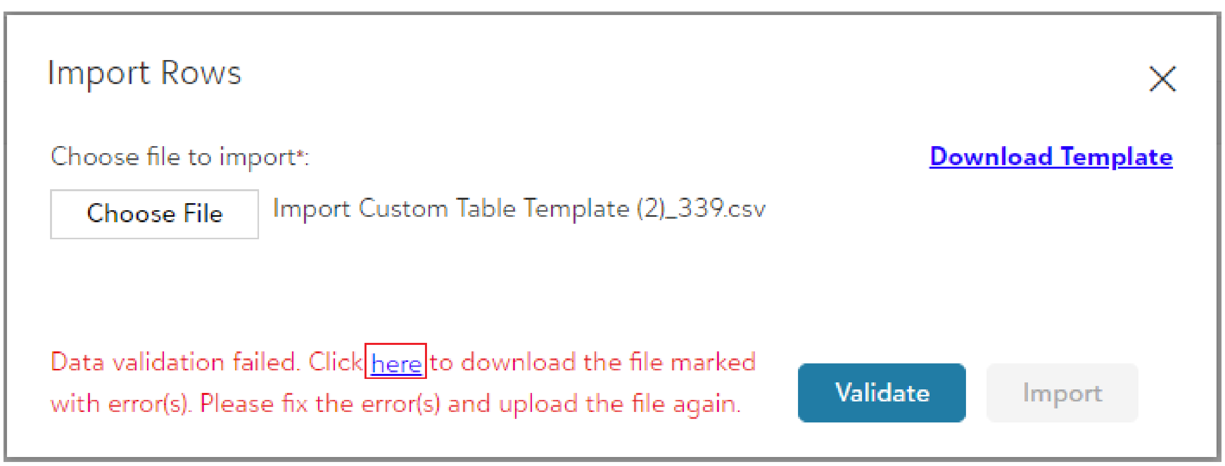


9) After successful validation, the **Import** option gets enabled, by clicking on it, the information gets imported to the rows within the column.

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.

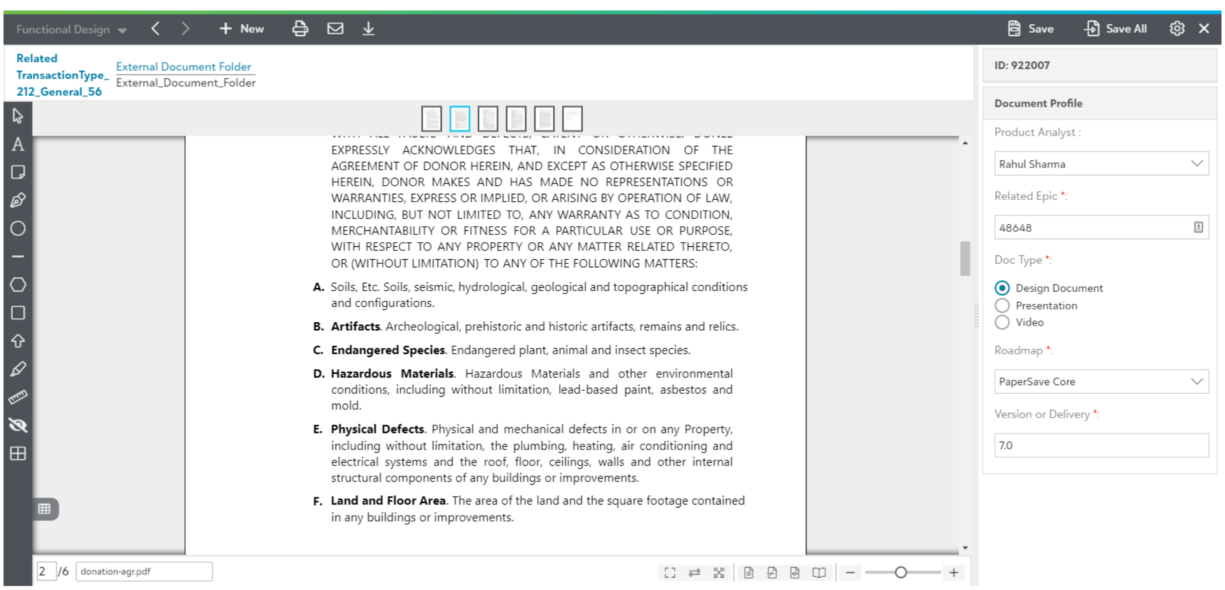
Note: If the two rows having the same data within the .CSV file, only a single row gets imported.

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.

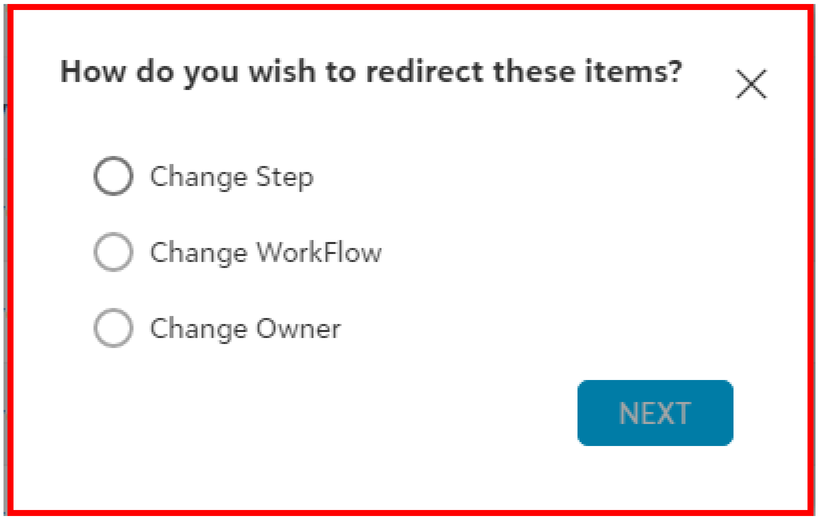
REDIRECT

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

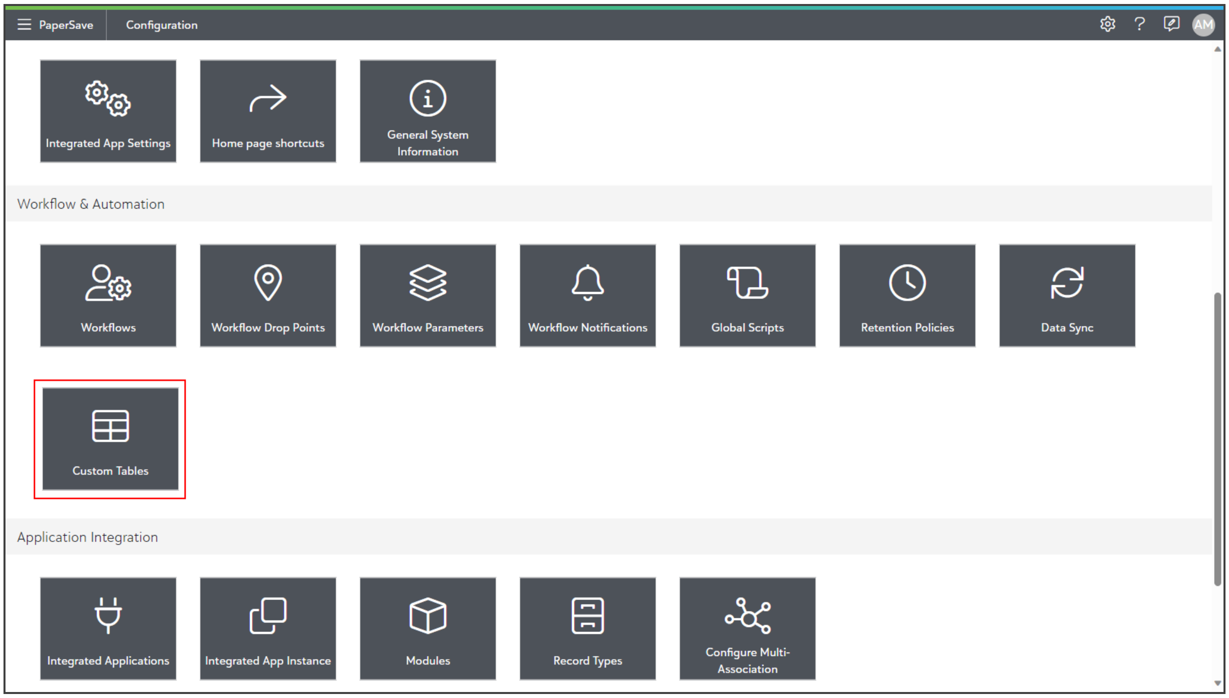


Tip: The user must have the Workflow rights "Groups/Users that are allowed to move items from this workflow to another workflow" to redirect the Workflow items.

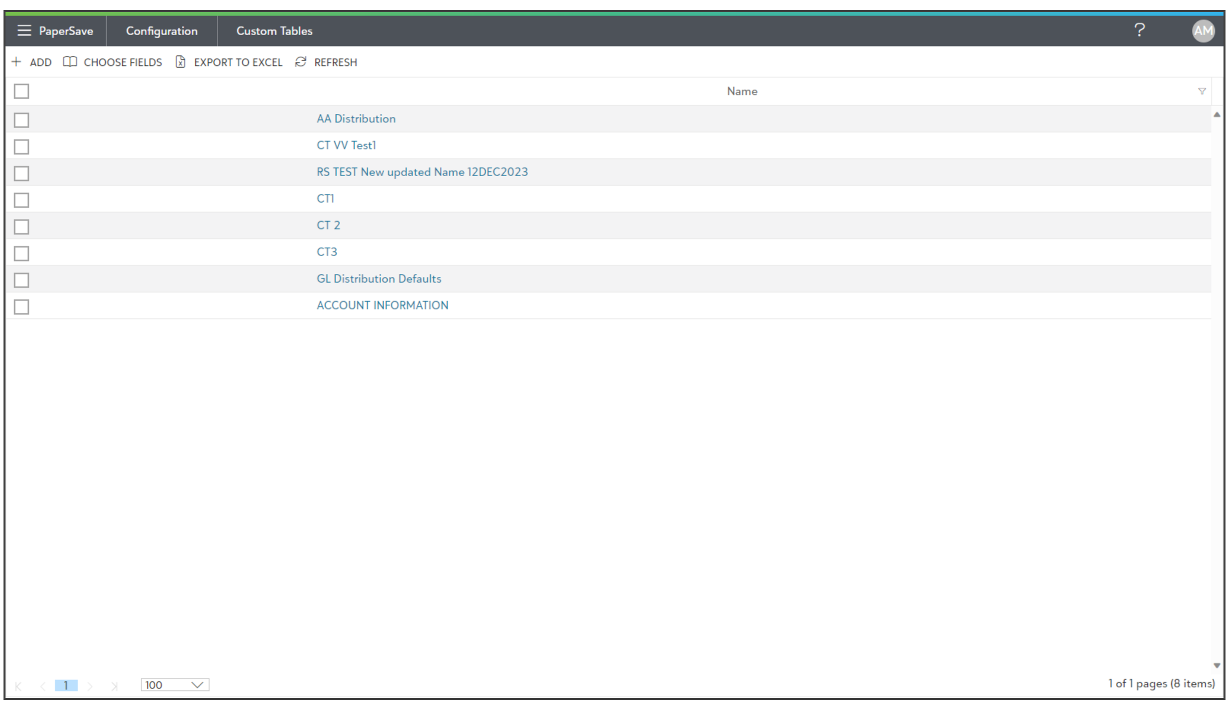
Importing rows into the Custom Tables

To import rows to the custom table, follow the below steps:

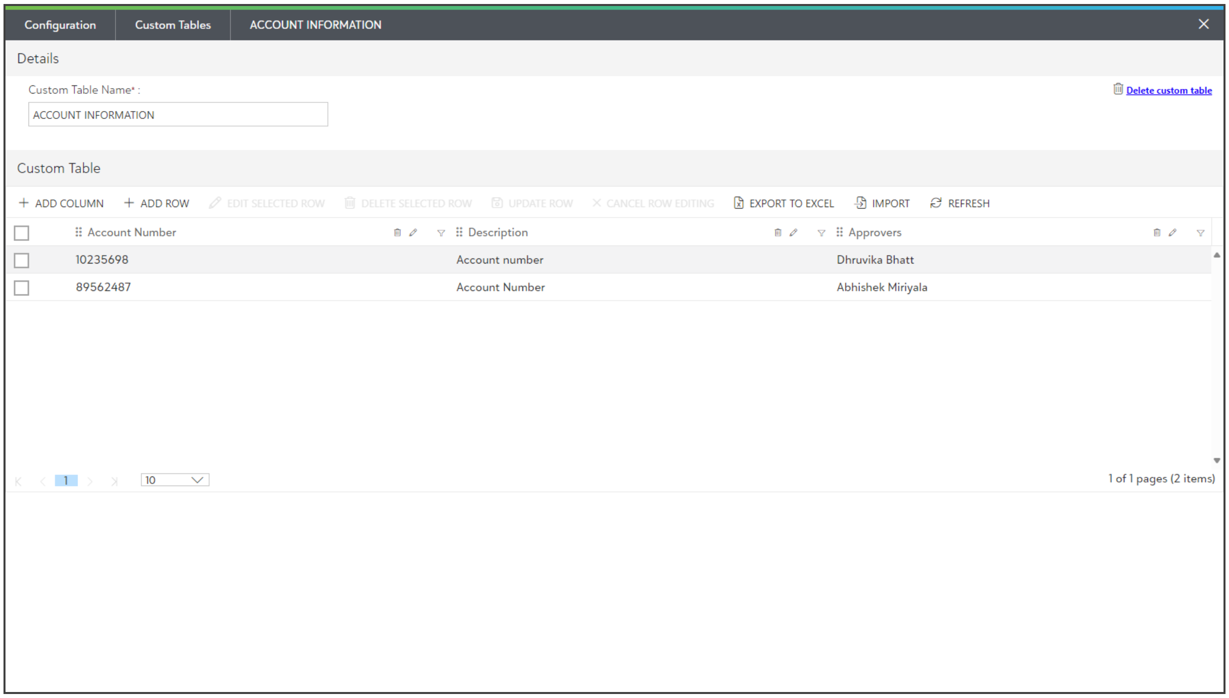
1) Click on the Custom Tables tile in the **Workflow and Automation** section of the **Configuration Area**.



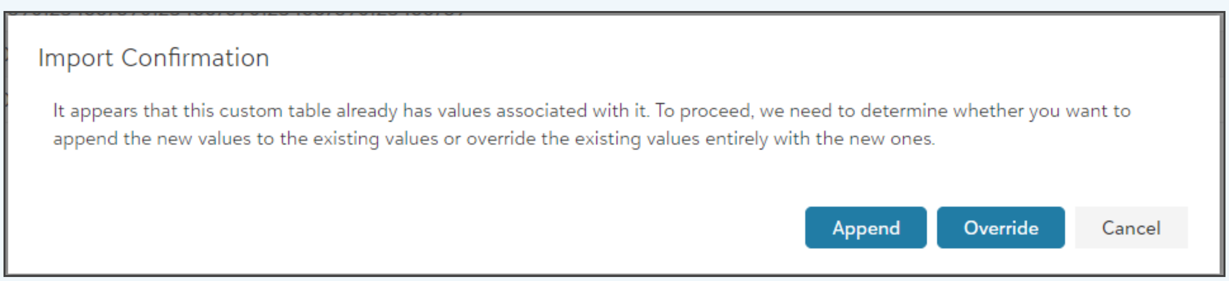
2) Now, the Custom Tables list view page opens, click on the desired custom table from the list as shown below.



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

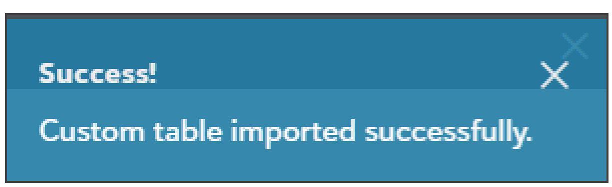
• For Native Authentication - User name field should have "User name followed by tenant id"
Example: amiriyalapsservices

7) Now, upload the saved file, by clicking on the **Choose File** button as shown below.

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.

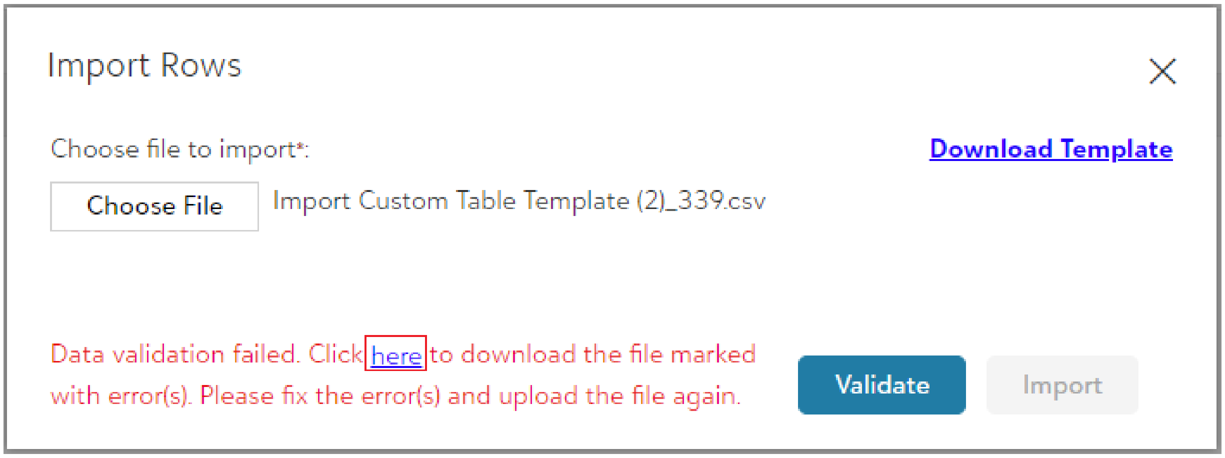
9) After successful validation, the **Import** option gets enabled, by clicking on it, the information gets imported to the rows within the column.

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 Paramter 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 PaperSave 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.

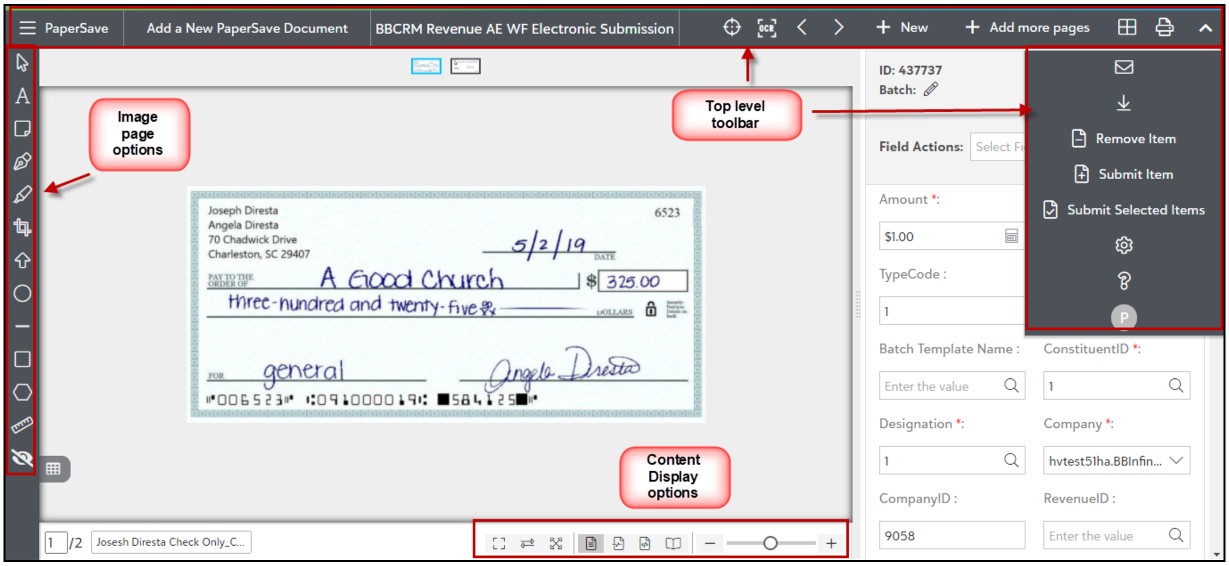
• **ScriptResult.ShowCancelMessage**: This function can be used to display a message box from the JavaScript execution. When the value of the ScriptResult.CancelScript is set to "True" in that case it will display a message box when cancelling the script, in case where the value of the ScriptResult.CancelScript 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 unsubmittted items in the Item Manipulation, etc.

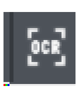
The following screen displays the various options available in the Item viewer for validating the Workflow item.

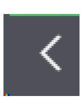
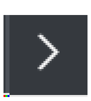


The following is the description of various options available to validate the Workflow item in the Acquire Area:

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:

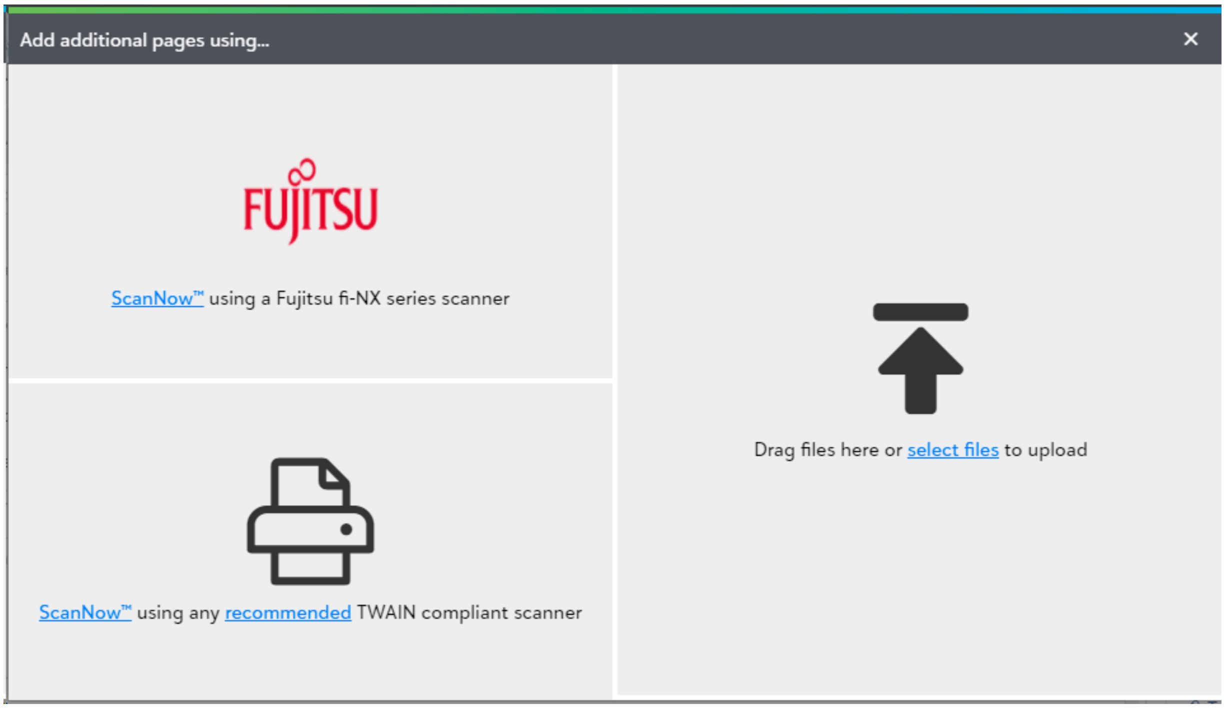
-  - Use this option to Click or Drag the selected value from the Content to the Profile field. The default behavior for Click or Drag to capture can be defined from the Settings panel.
- 

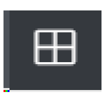
 - Use this option to process OCR on the current document. Using this option will override the current values in the profile field panel.
-  - Click on this option to navigate to the previous unsubmitted item.
-  - Click on this option to navigate to the next unsubmitted item.
- 

 - Click on this option to switch to File capture options panel to acquire a new document.

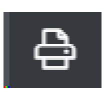
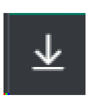
- 

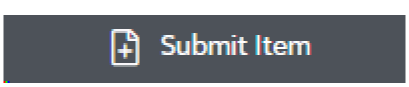
 - Click on this option to add more pages to the current document. clicking on this option will display the following "Add additional pages" prompt.



- 
 - 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.

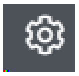
The following video covers the Page manipulation view:

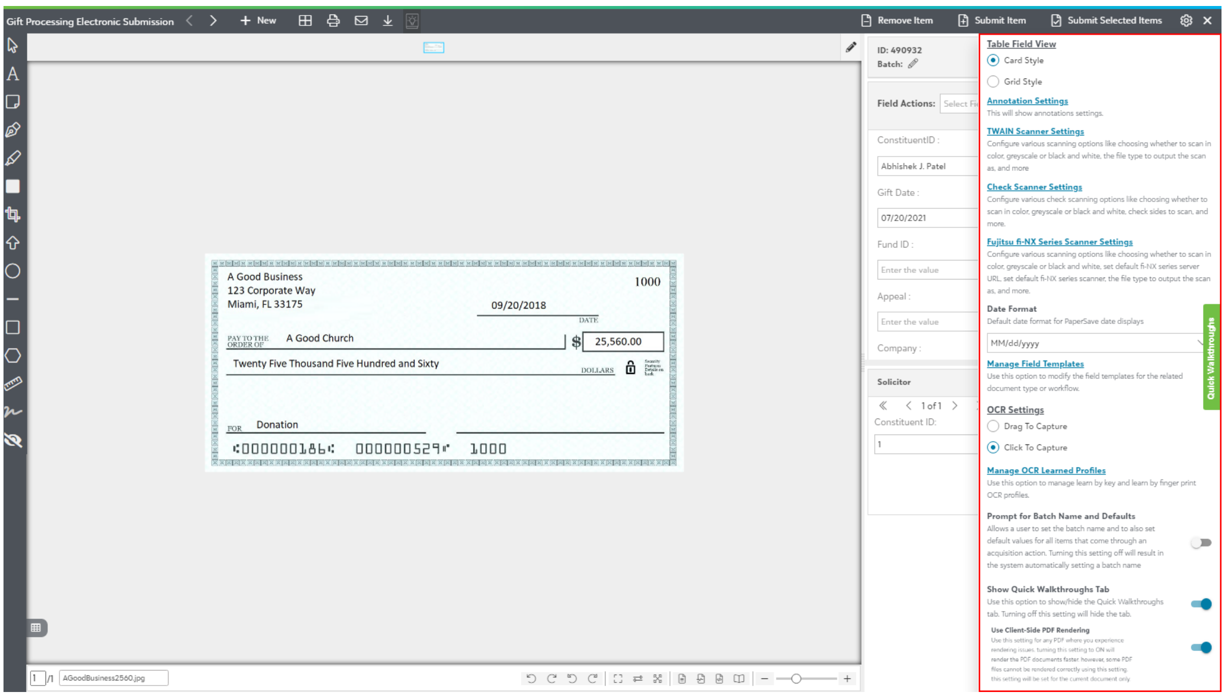
-  - Click on this option to print the current document.
-  - Currently, this feature is not yet implemented.
-  - Click on this option to download the current document.
- 

 - Click on this option to discard the current item.
- 

 - Click on this option to submit the current unsubmitted item.

- 

 - 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:



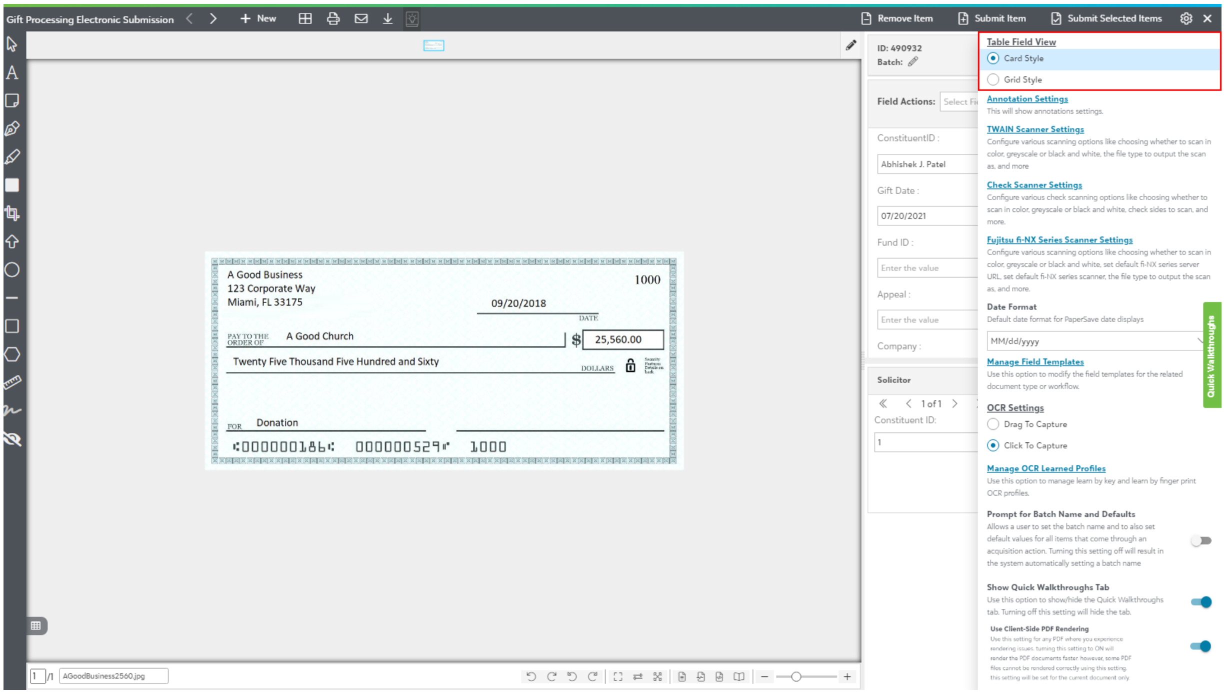
The following is the brief description of various preferences in the Settings panel:

TABLE FIELD VIEW

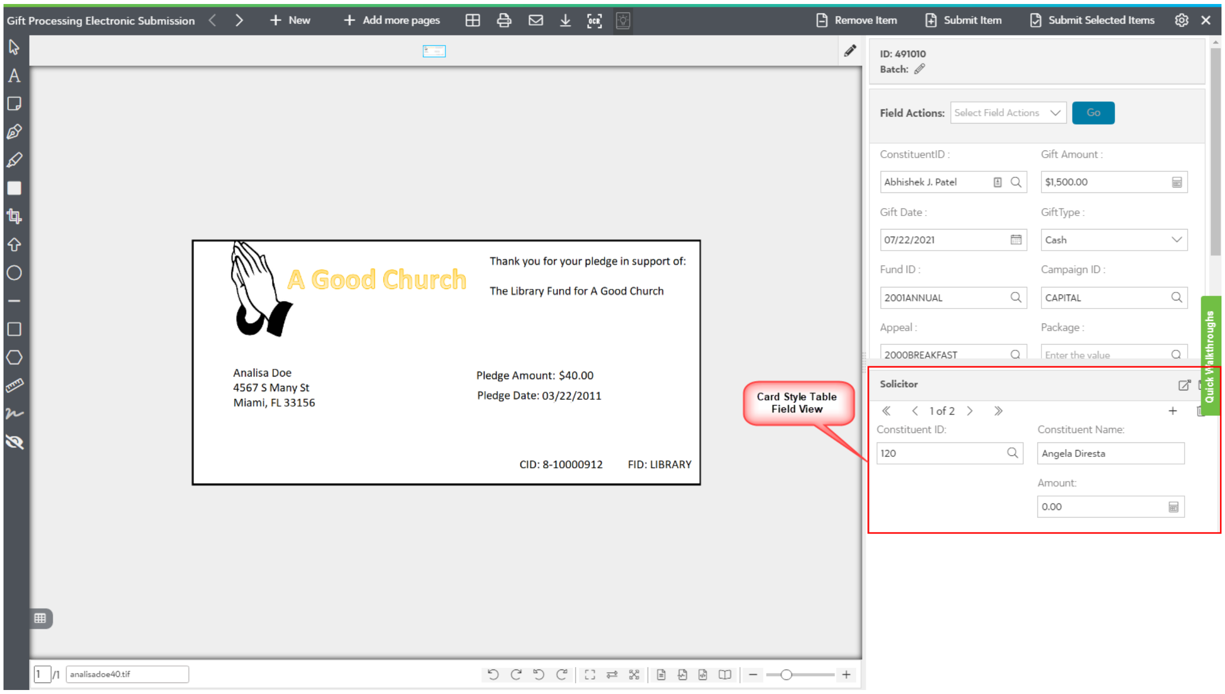
PaperSave offers a widget with two different user interfaces (card style and grid style) for the table type fields in the document profile field panel. Card style is set as default option.

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:

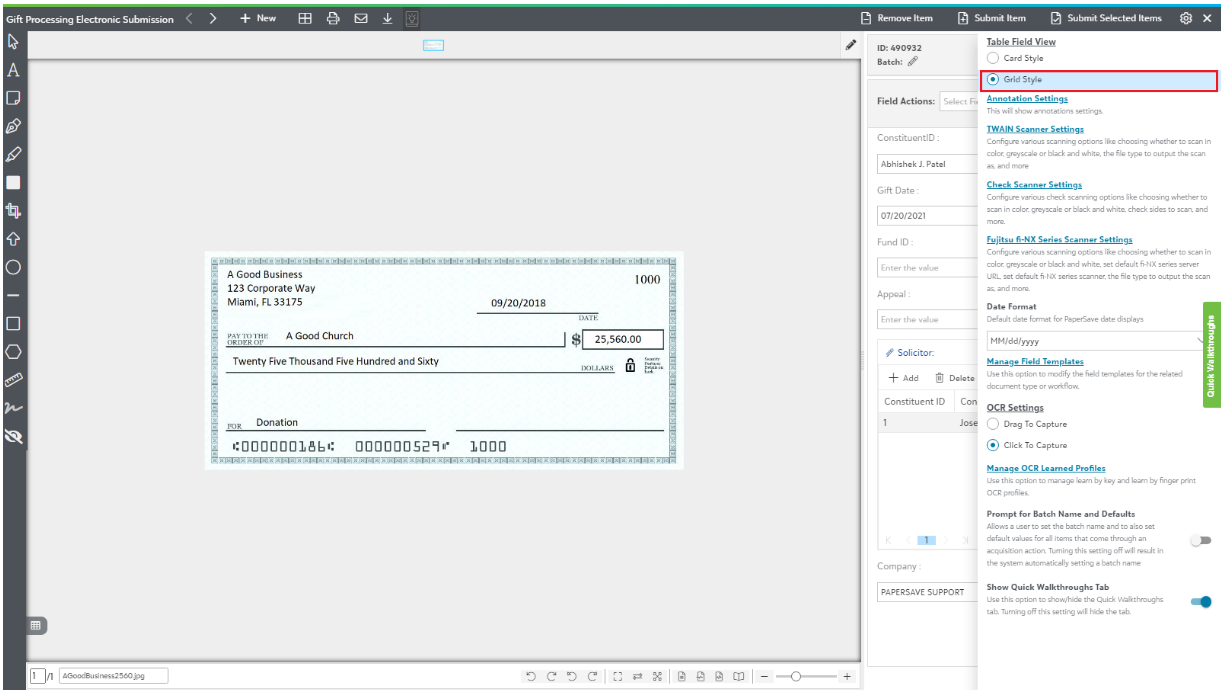


You will see "**Card Style view**" for the Table type fields in the document profile field panel as shown in the following screen.

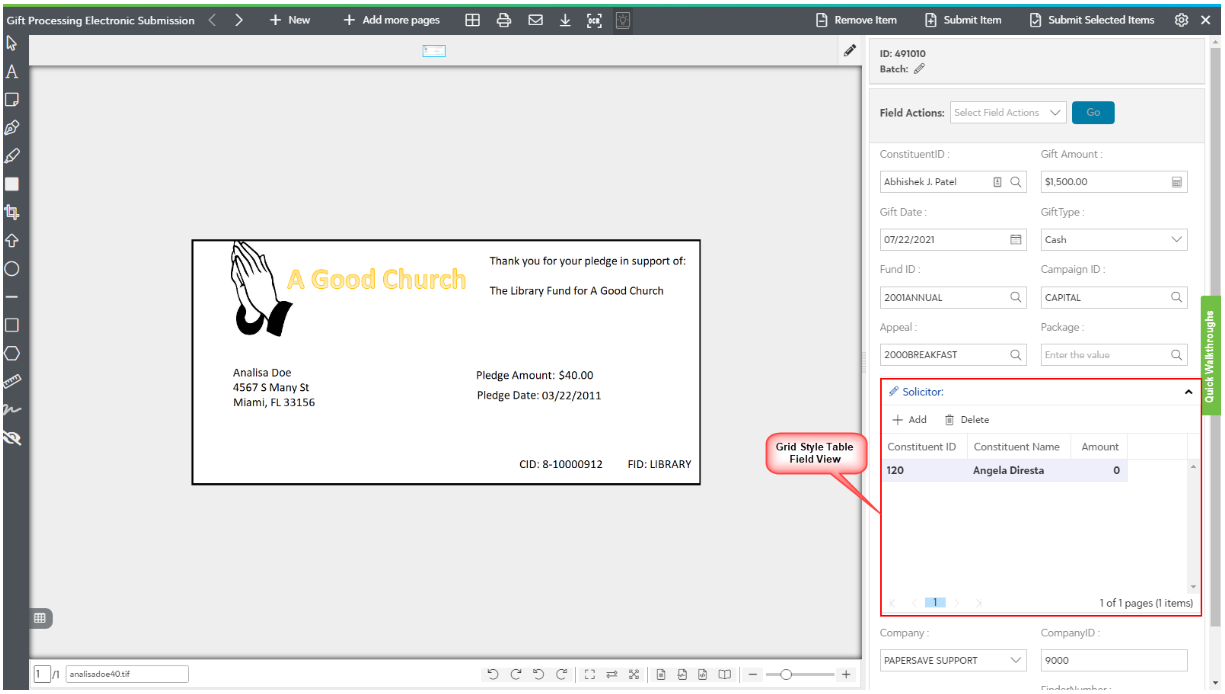


Grid Style: It switches the "table type field" widget to Grid view.

Select the Grid style option in Table field view Settings as shown in following figure:

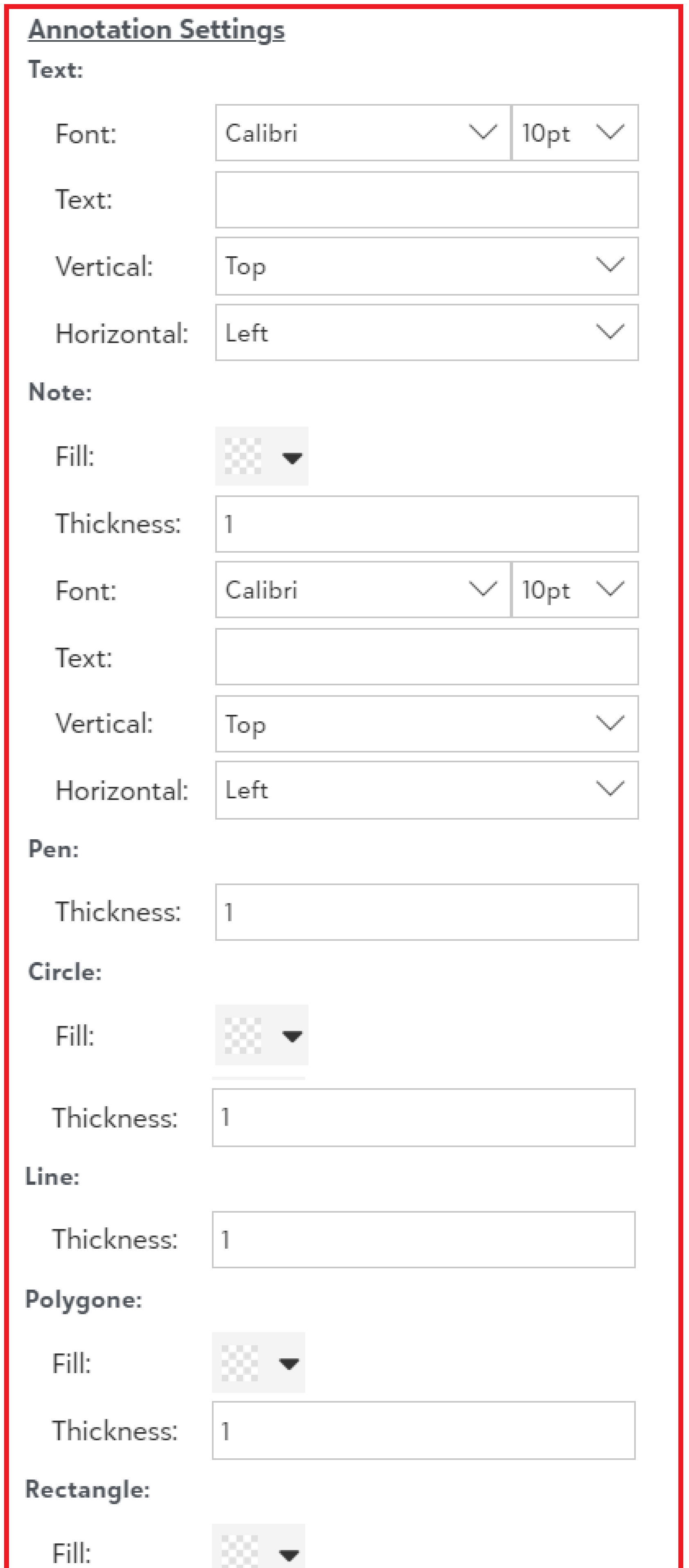


You will see "**Grid Style view**" for the Table type fields in the document profile field panel as shown in the following screen.



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:
1
Font:
Calibri
10pt
Text:
Vertical:
Top
Horizontal:
Left
Pen:
Thickness:
1
Circle:
Fill:
Thickness:
1
Line:
Thickness:
1
Polygone:
Fill:
Thickness:
1
Rectangle:
Fill:

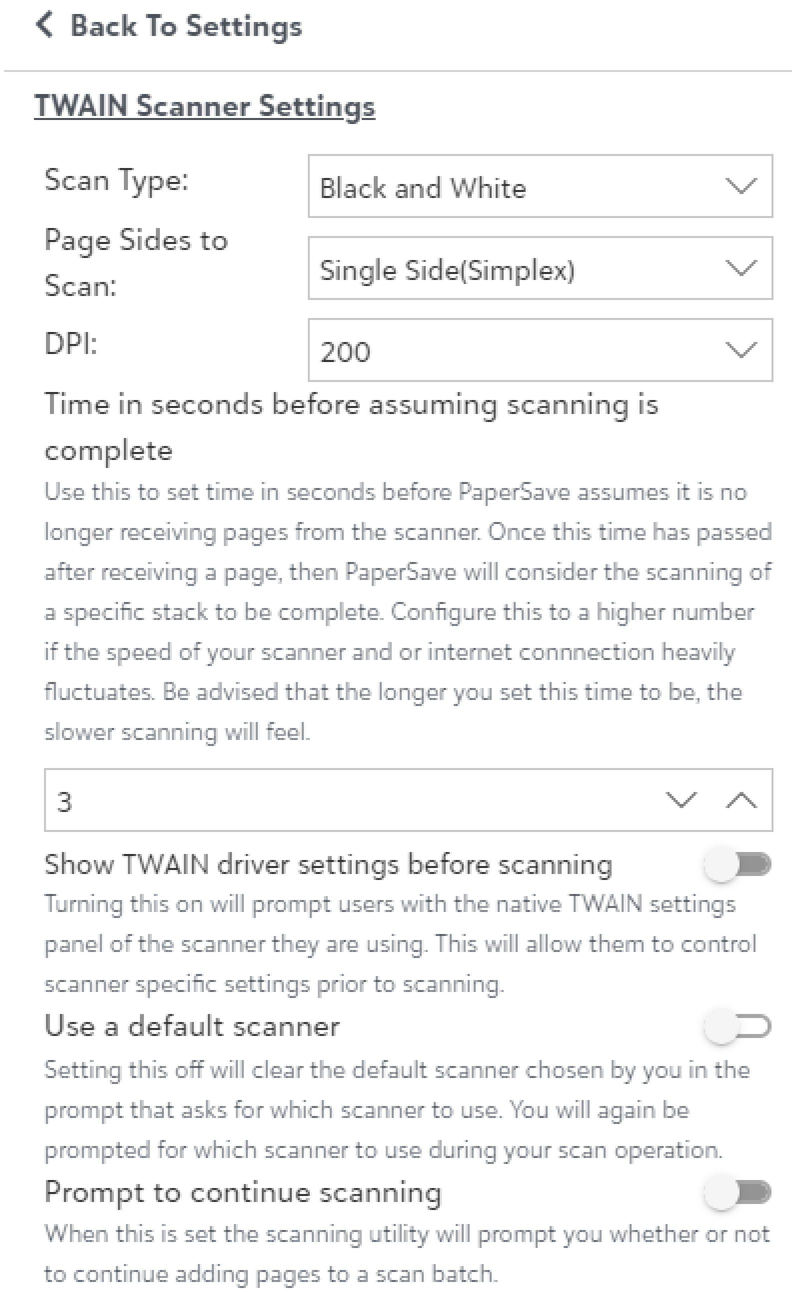
Text, Note: Select font, font size, default text, vertical and horizontal alignment.

Pen, Circle, Line, Polygon, and Arrow: Select the thickness and color.

Highlighter: Select the color.

TWAIN SCANNER SETTINGS

This Setting option enables you to configure the following scanner related preferences as shown below:



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

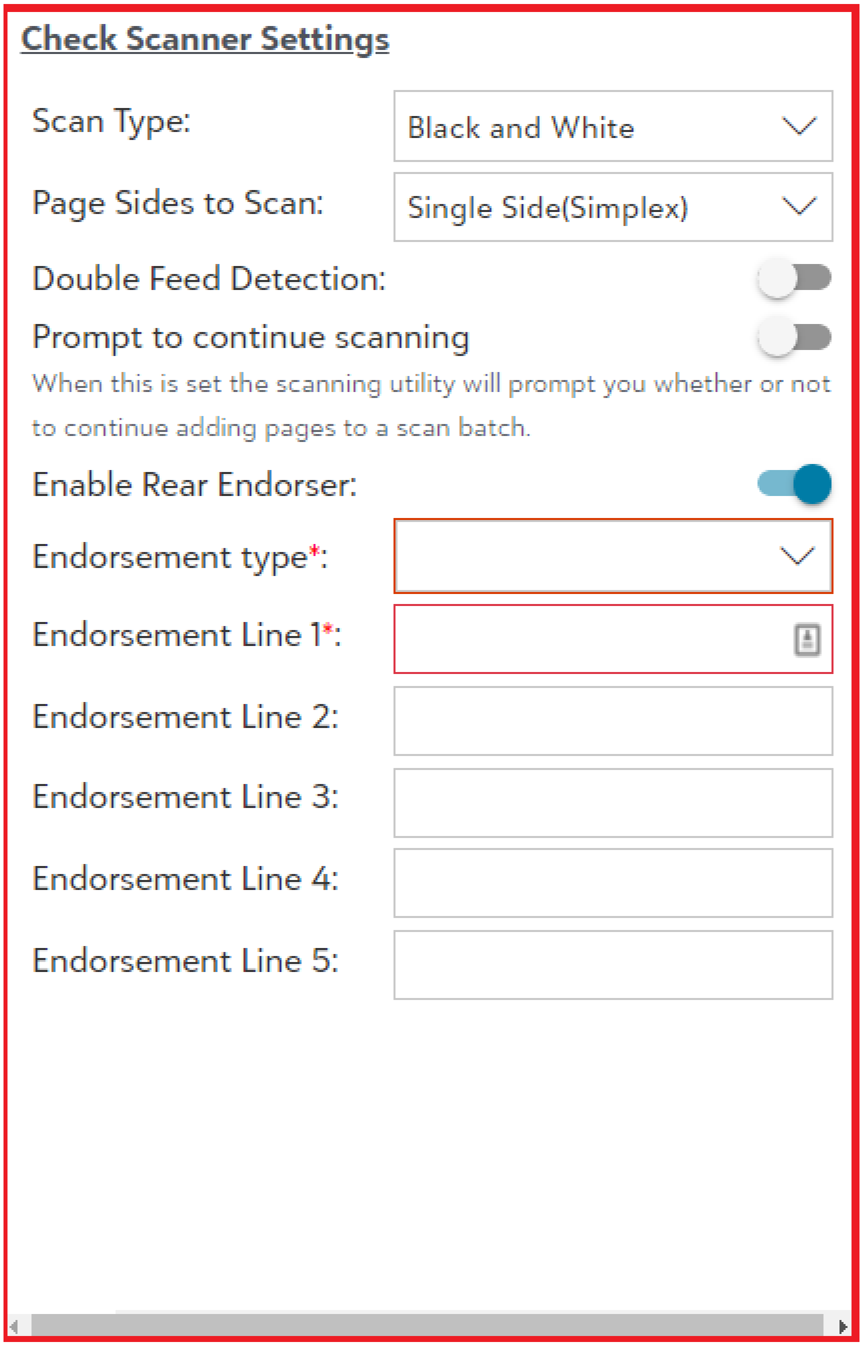
Turning this on will prompt users with the native TWAIN settings panel of the scanner they are using. This will allow them to control scanner specific settings prior to scanning.

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:



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.

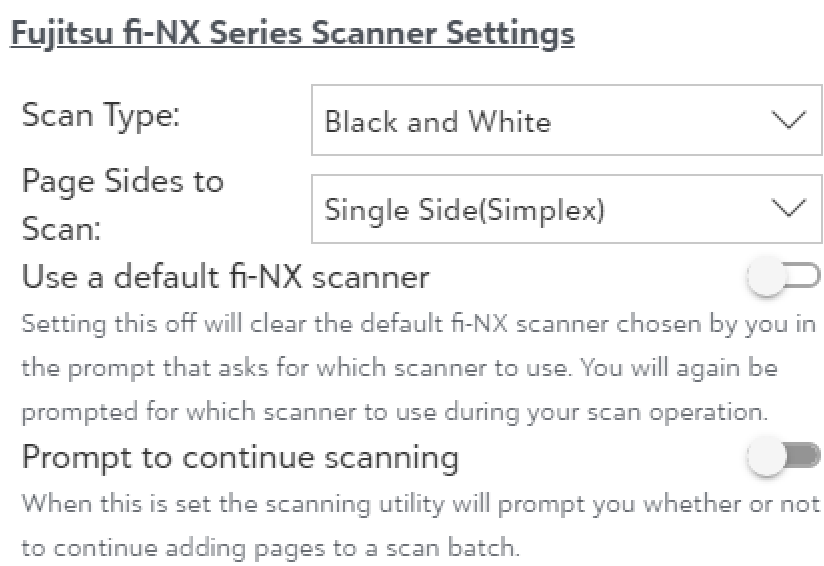
Endorsement Line 1 to Endorsement line 5:

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:



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.

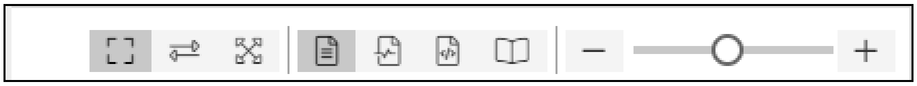
Using Image page options(Annotations) for Unsubmitted items

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.

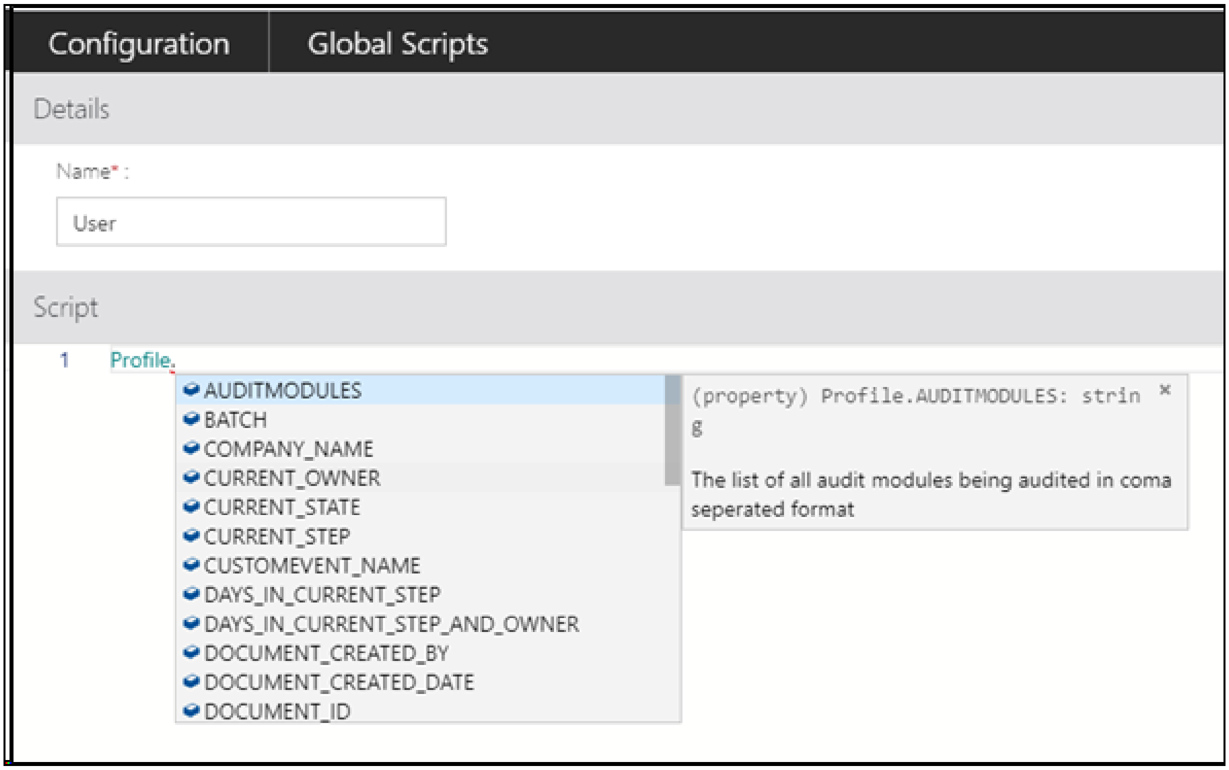
Correcting fields using Drag to Capture tool

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.DROPPOINT_ID	It fetches the Drop point ID for current Workflow item.
Profile.DROPPOINT_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 syntaxto return a single column value for a specific row. ResultVariable[RowIndex].ColumnName
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:

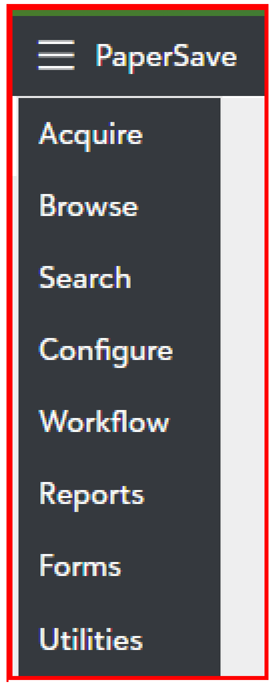
- For Example – Let's say you need to search the items containing the digits '**1625**'. Enter the digits "**1625**" in the Quick Search bar to find the relevant items.

- 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, ¿, ¡
>
> **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:

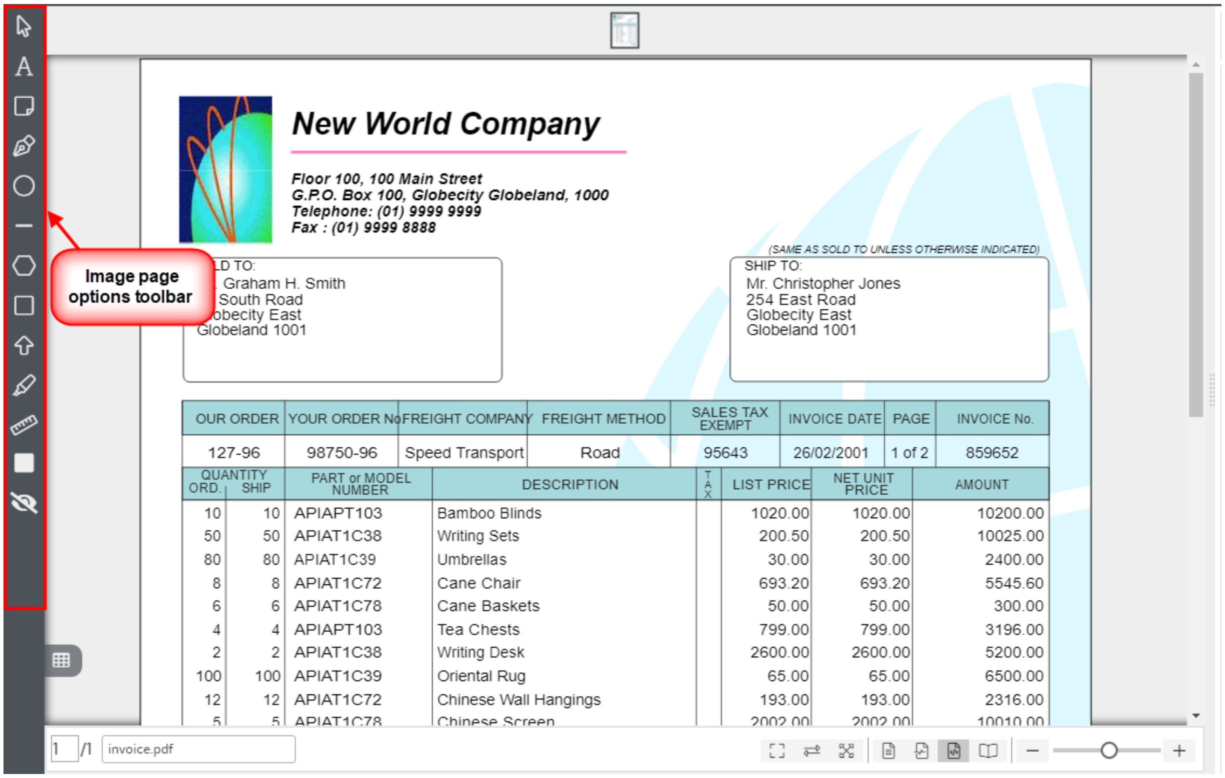


Using image annotation options

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.

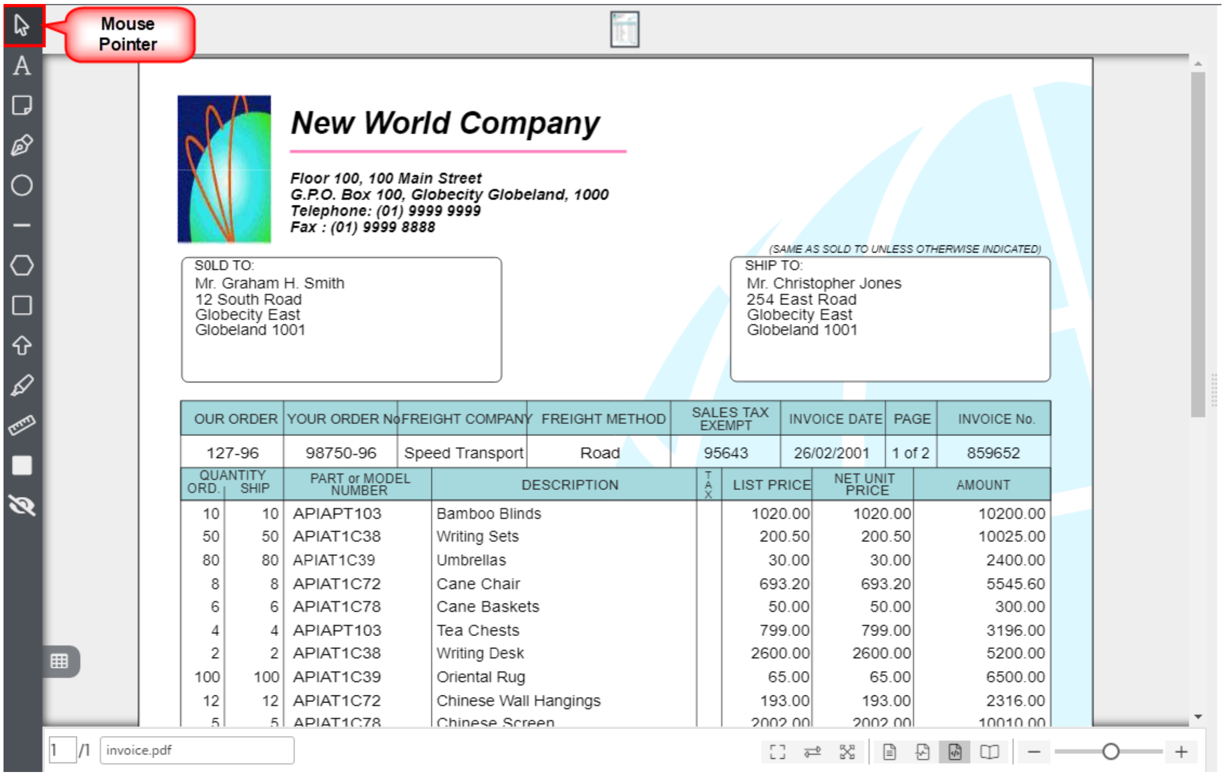
Note: These options will remain disable when a current user does not have rights to add/edit the annotations on the file in content viewer.



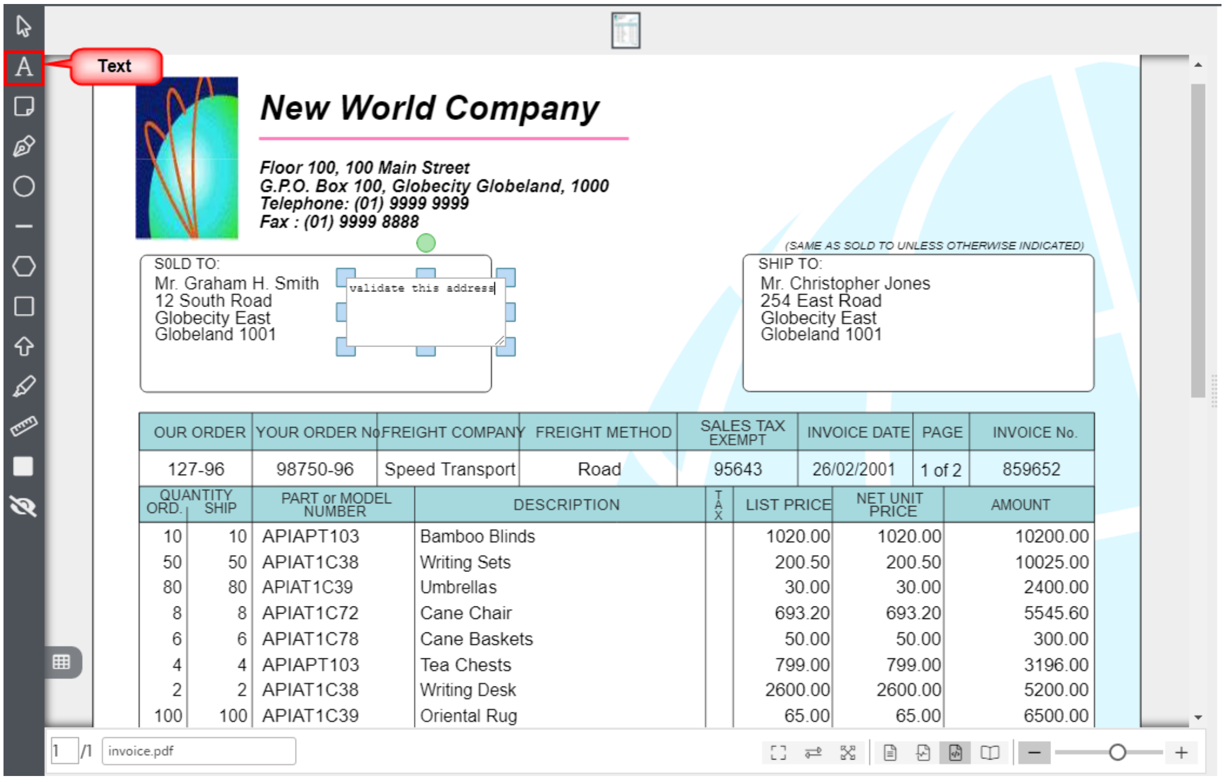
Watch the video to learn about the various options in the Image page options toolbar.

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.

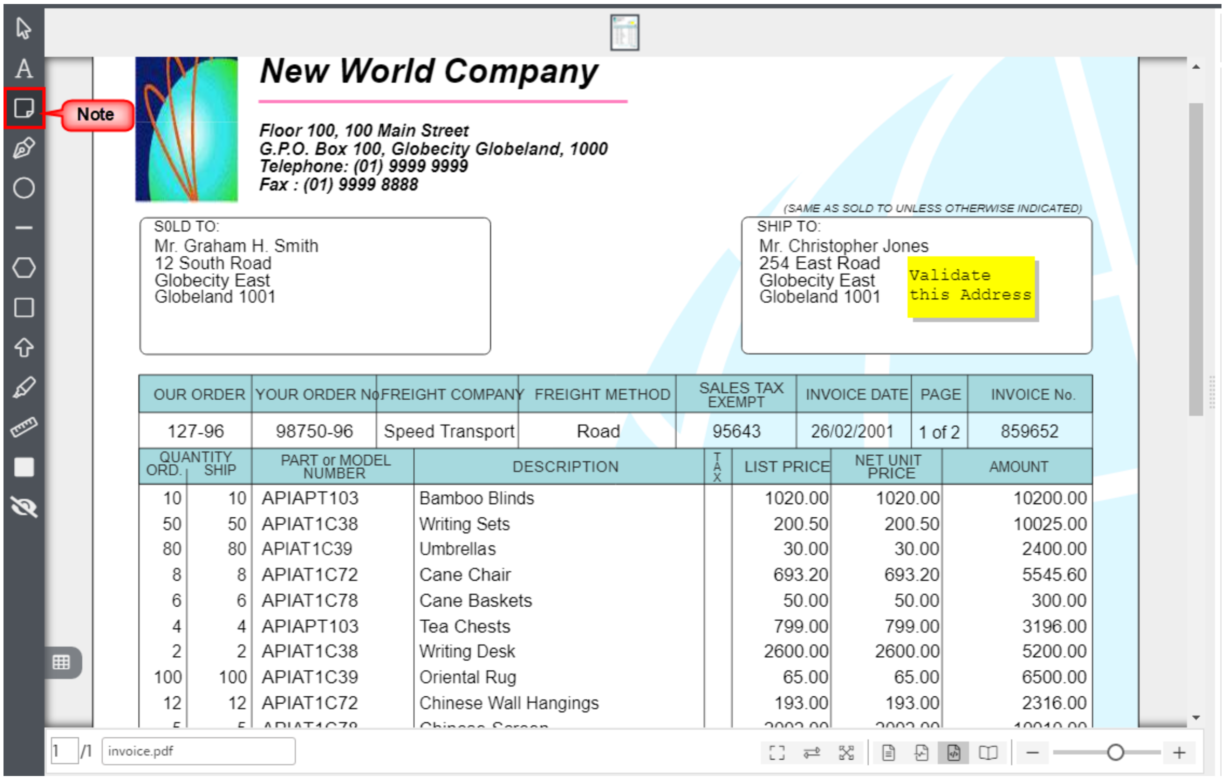


Text: This option  enables you to add text right onto a page on the current document.

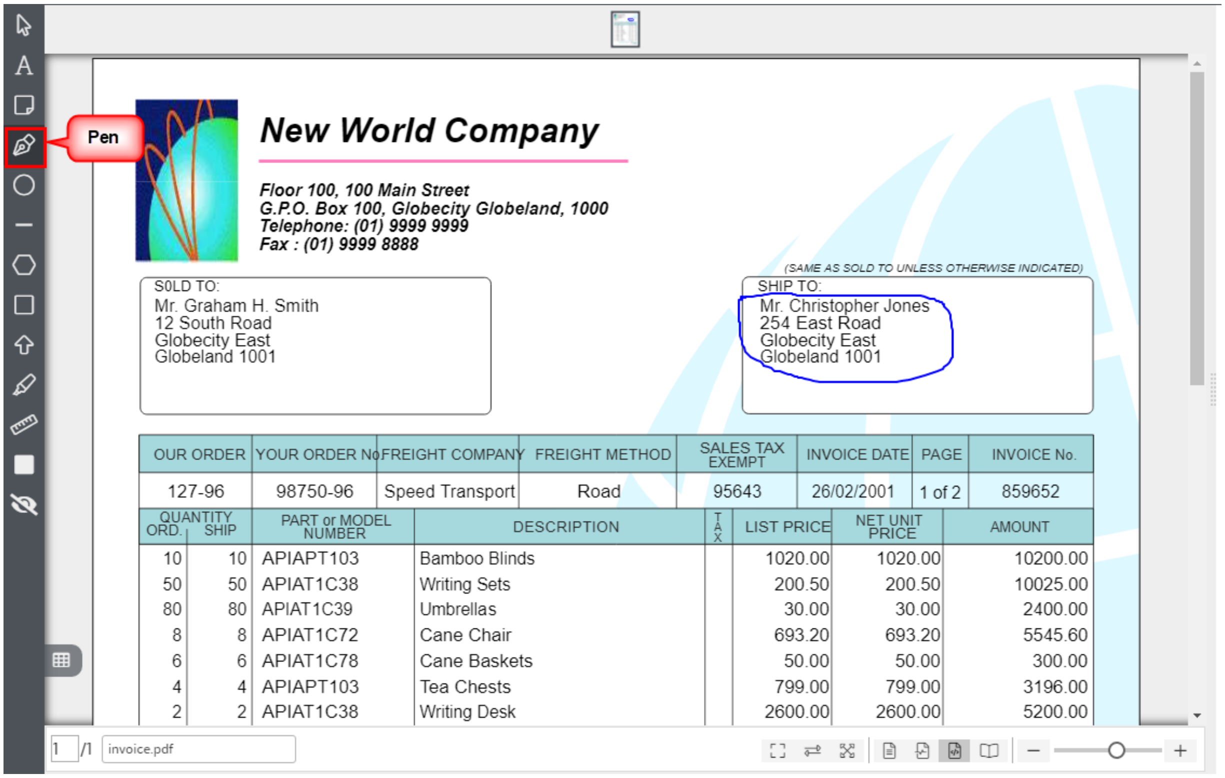


Note: This option enables you to add a sticky note to the current document.

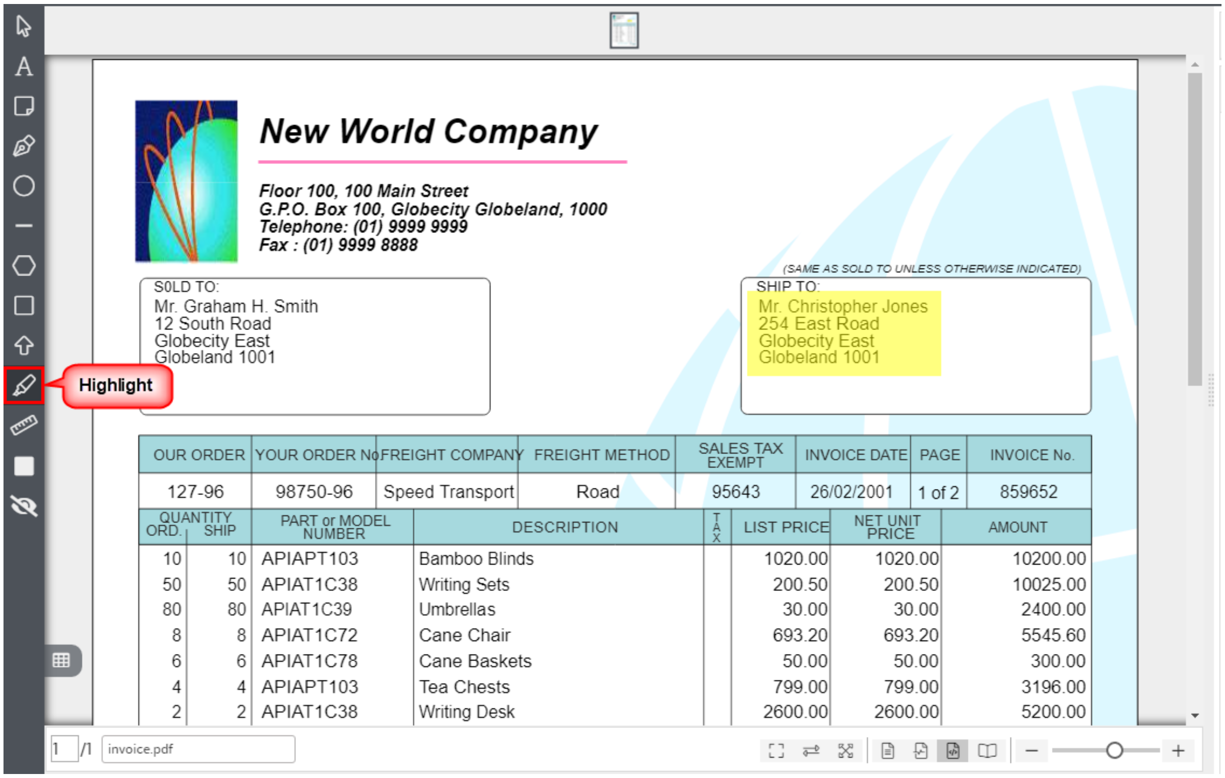
Select this option and click on the desired location on the document where you want to add a Note and the Add Note annotation box will be displayed. Here, you can select the icon from the list and add the note in the Contents box.



Pen: This tool  is used to draw on document pages.



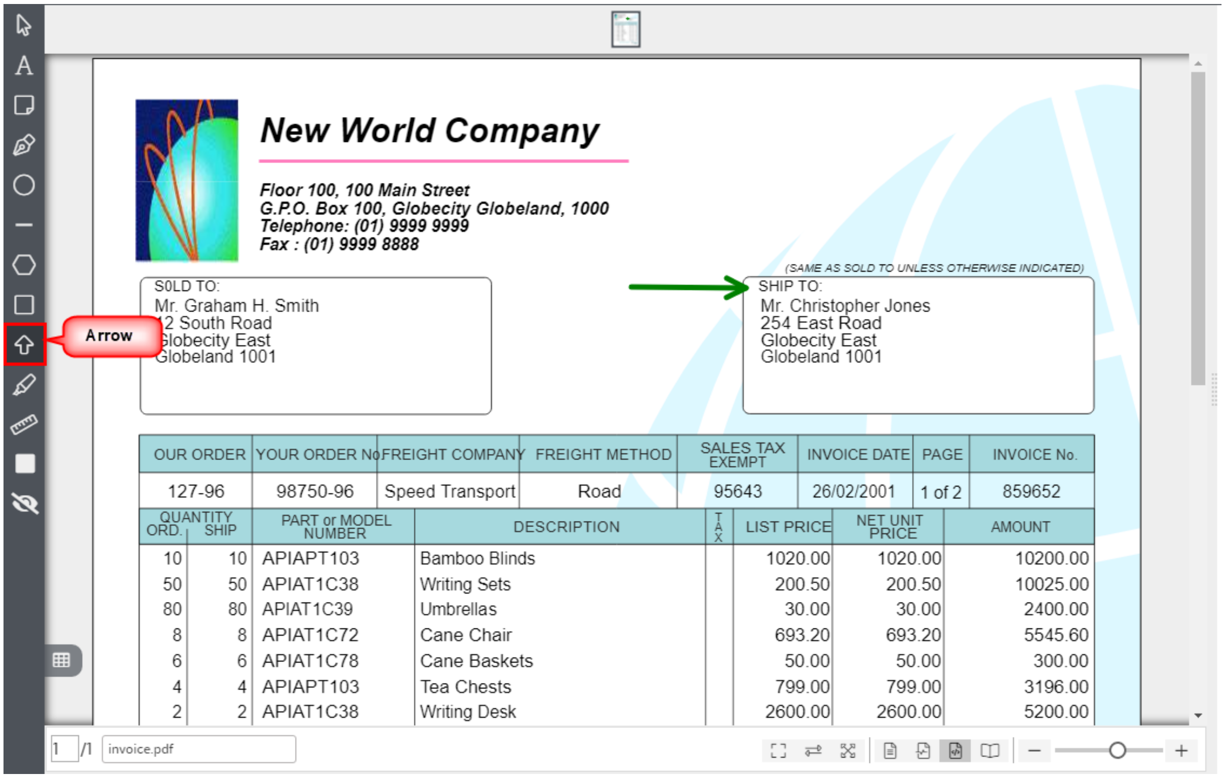
Highlight: This option  is used to highlight a desired area of the current document.



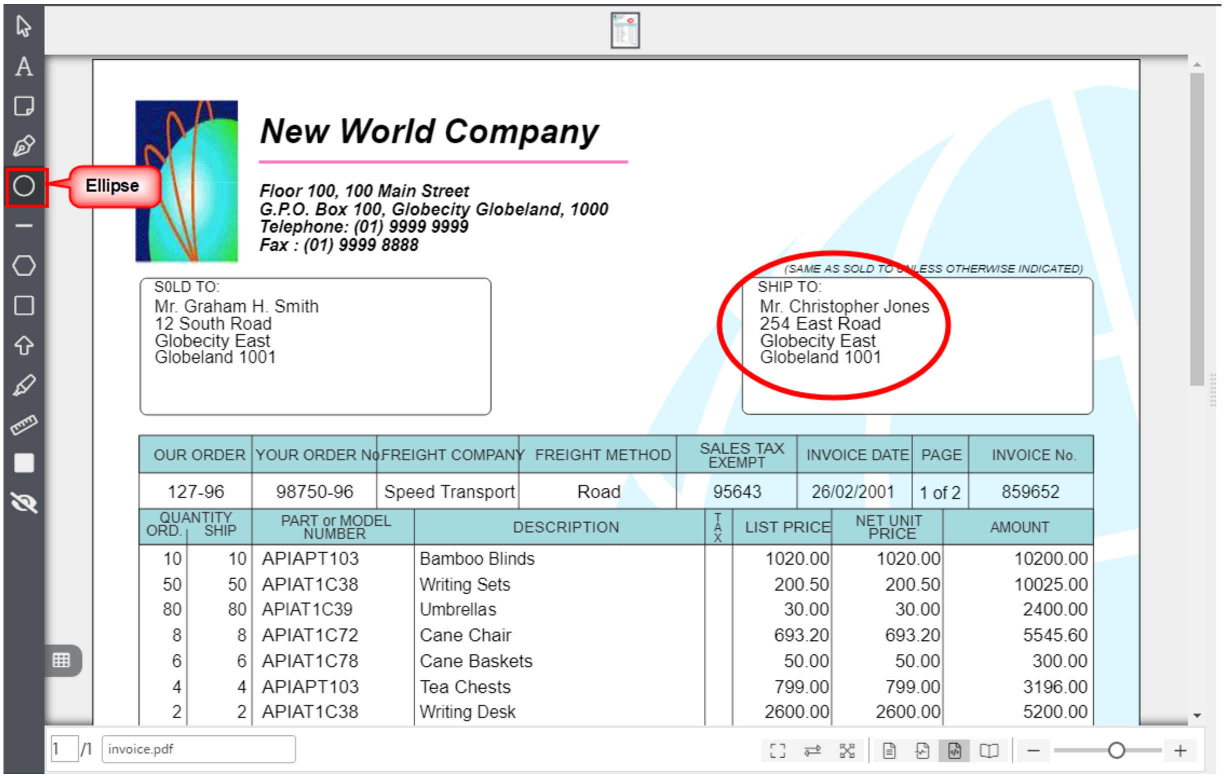
Crop: This tool is used to remove unwanted outer areas from the current item.

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.

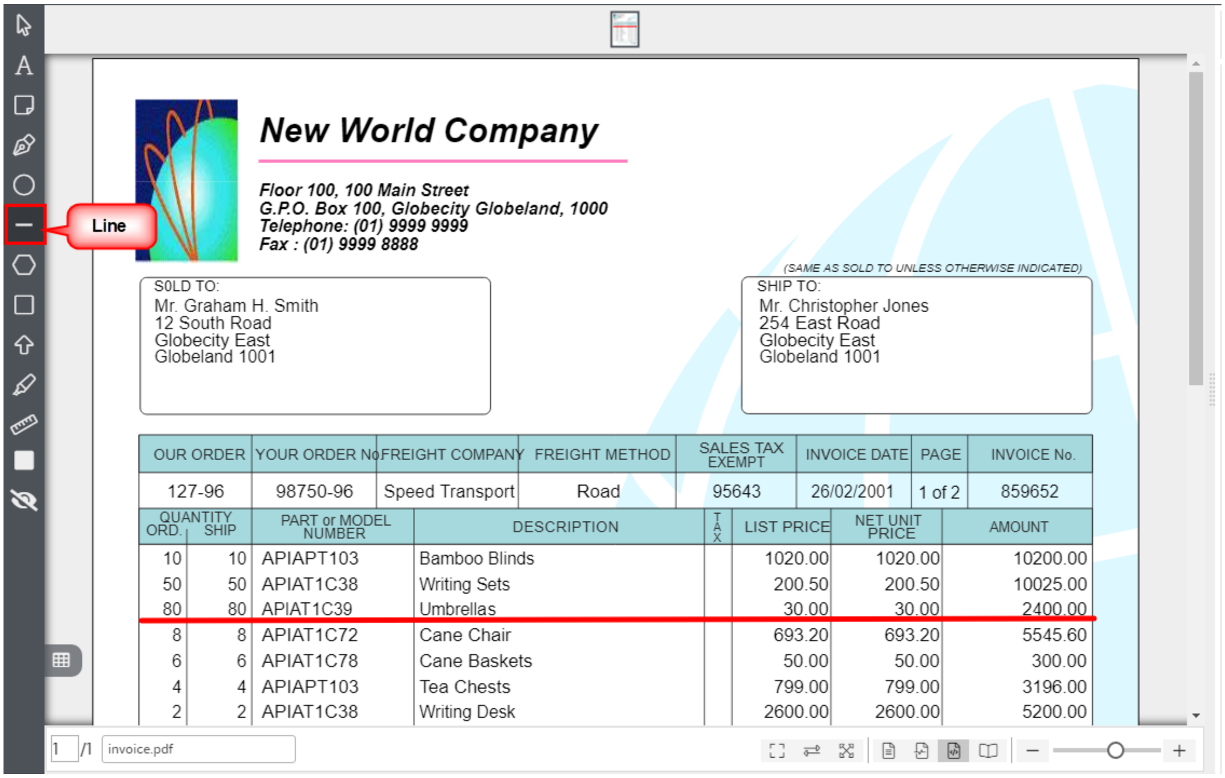
Arrow: This tool  is used to draw an arrow line on the current document.

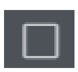


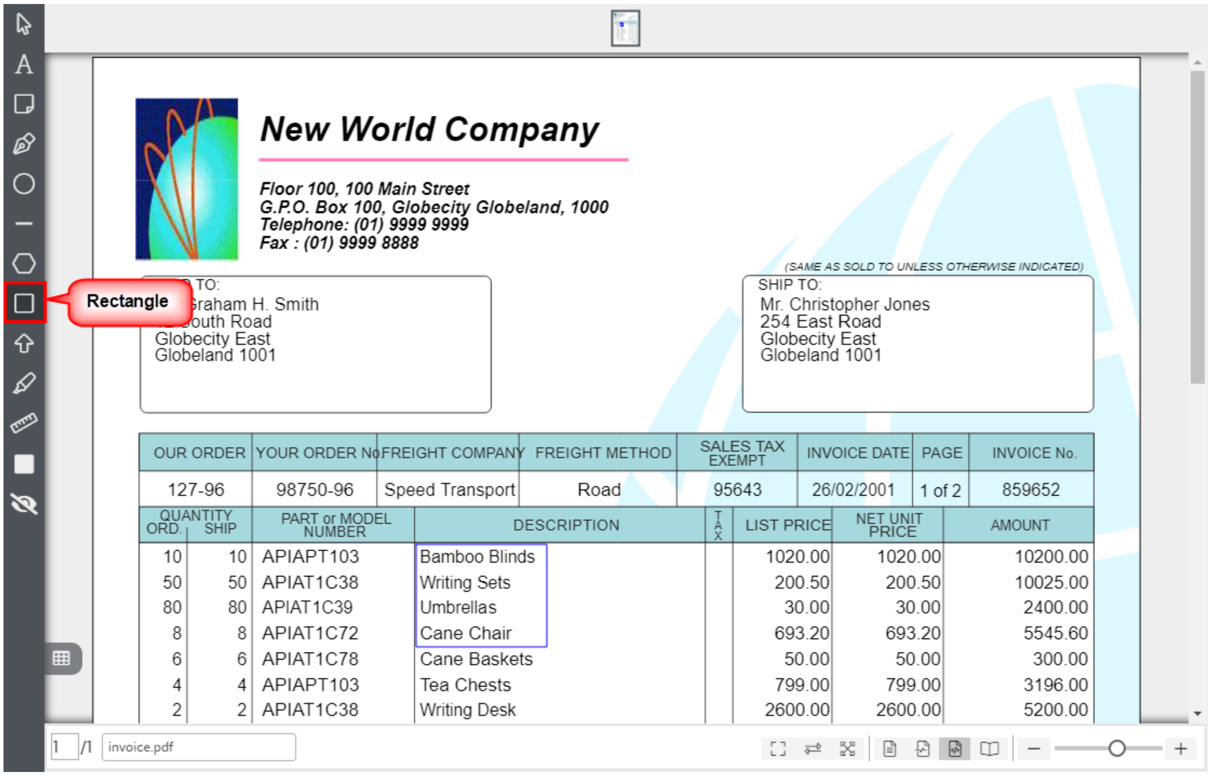
Ellipse: This tool  is used to draw an ellipse on the current document.



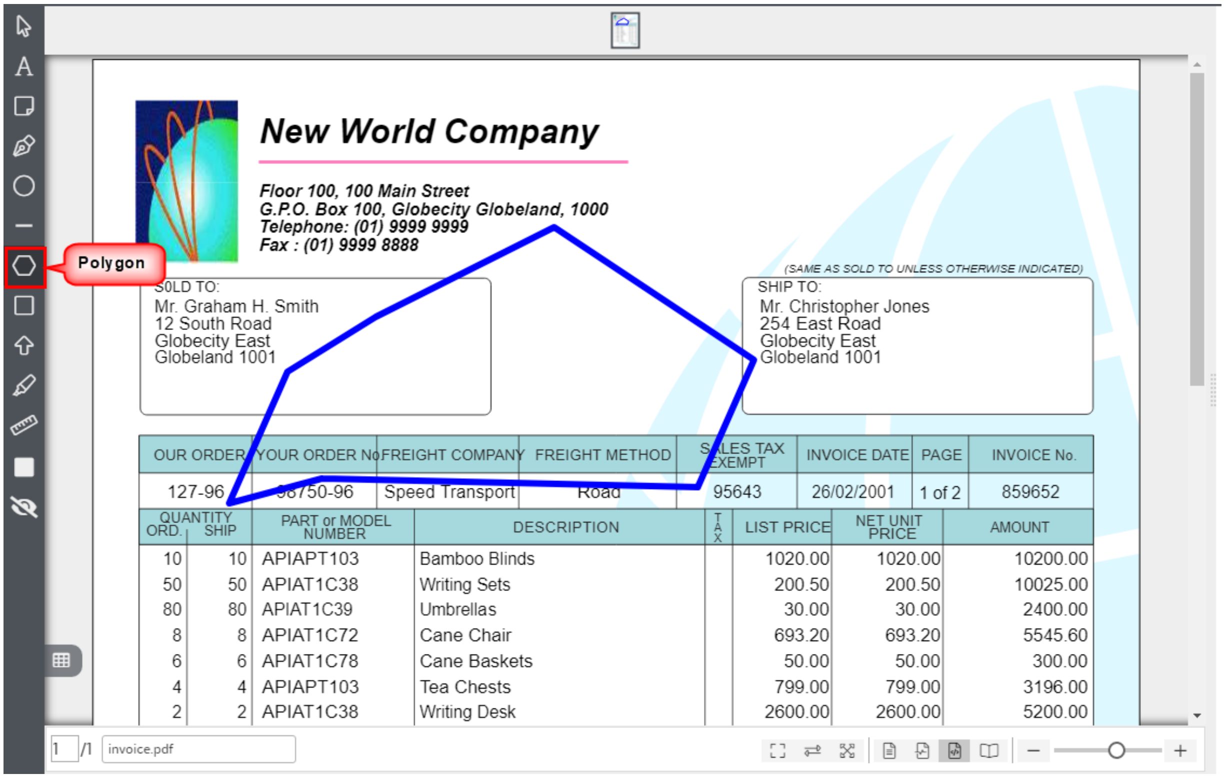
Line: This tool  is used to draw a line on the current document.



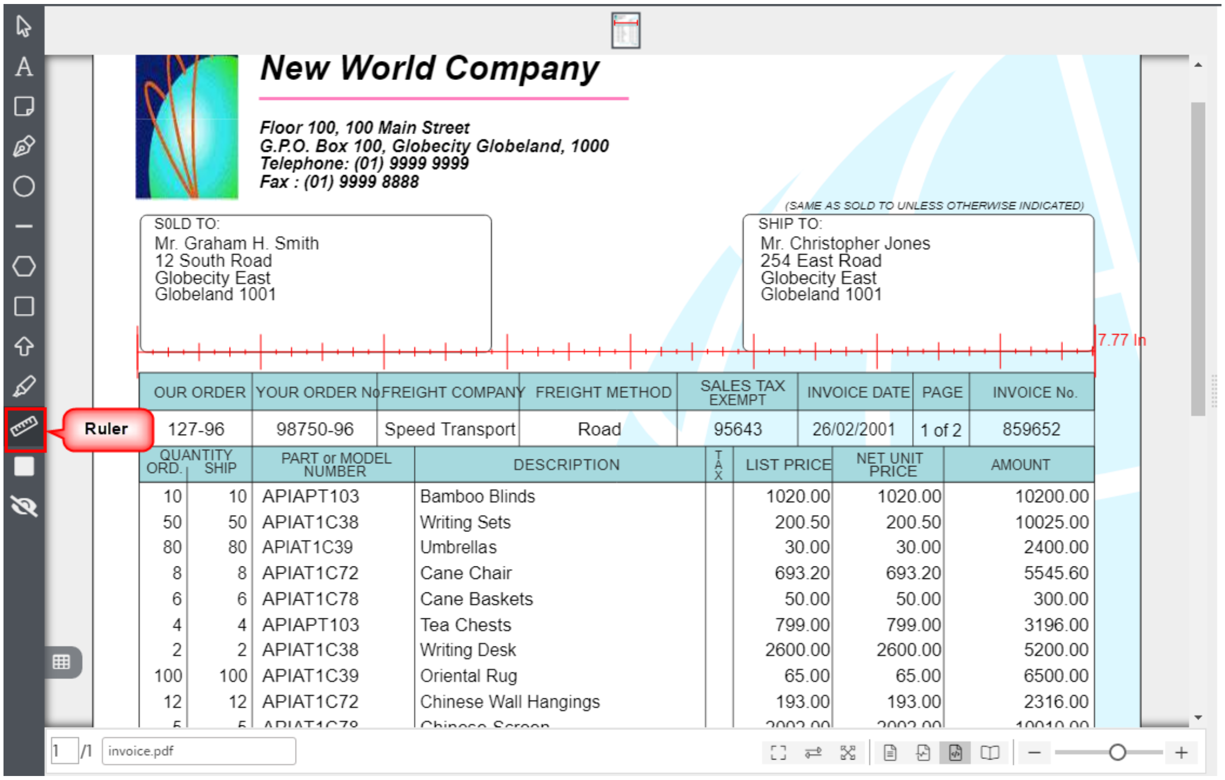
Rectangle: This tool  is used to draw a rectangle on the current document.



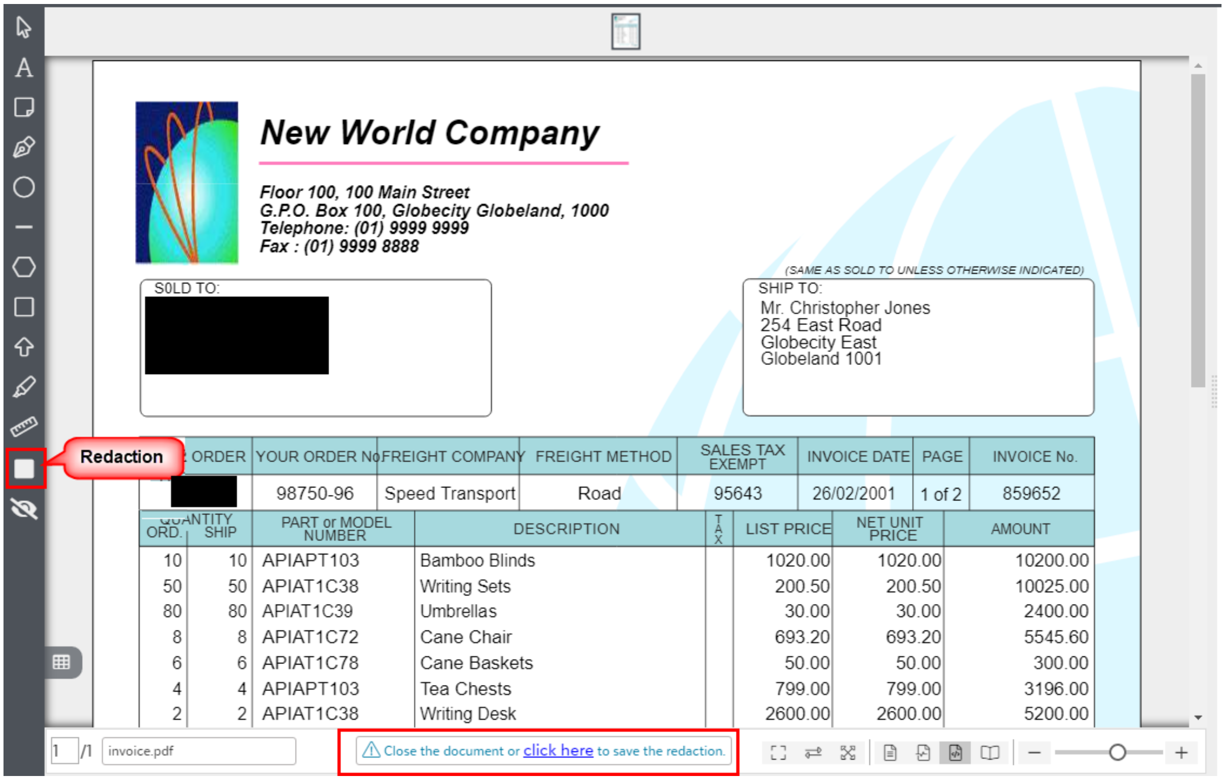
Polygon: This tool is used to draw a polygon on the current document.



Ruler: This tool  is used to measure the actual length of a part of the page of the current document.



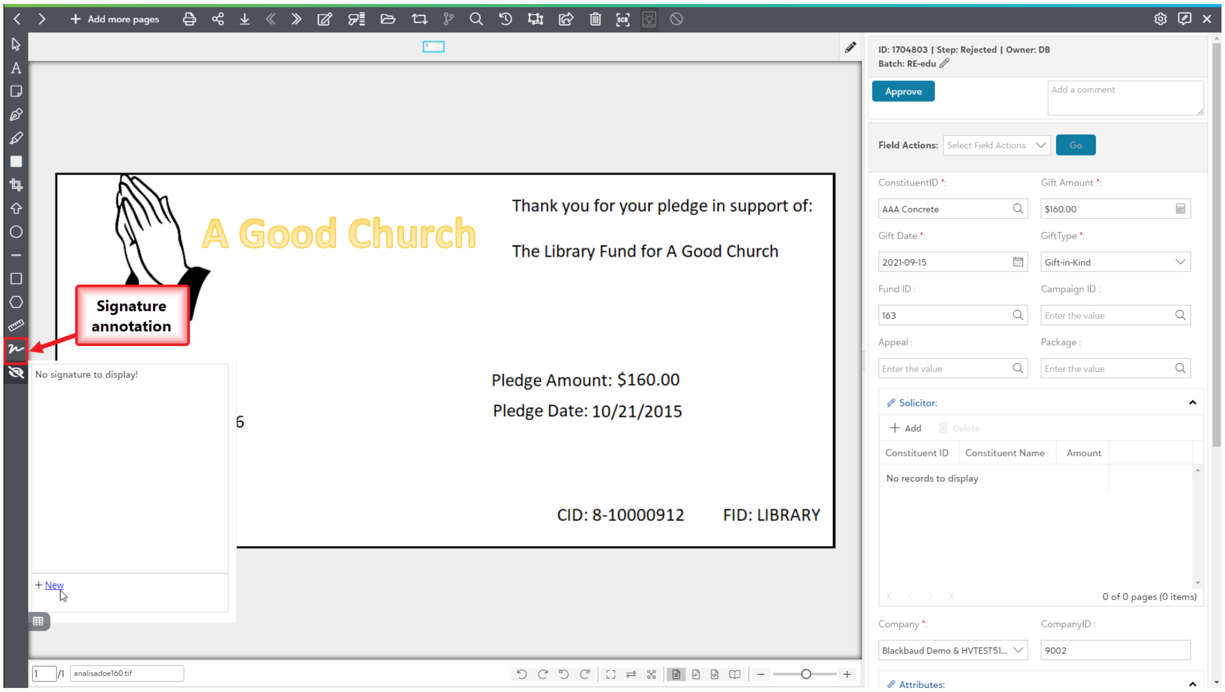
Redaction: This tool is used to black out sensitive information in order to remove it permanently from a document page.



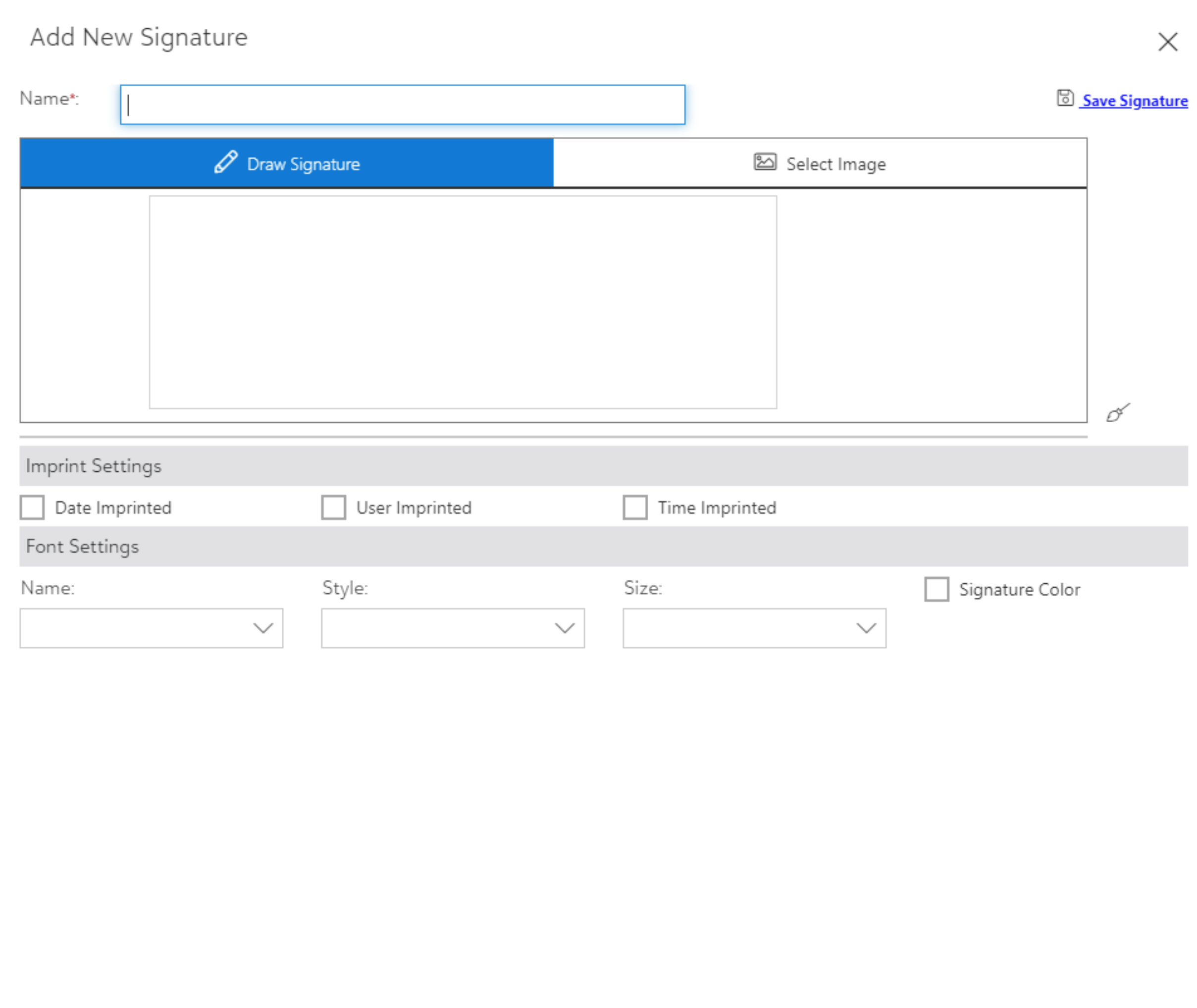
You will need to confirm the redaction once it has been applied by clicking on the "**Click here**" link as shown in the above figure to save the redaction changes.

> **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.



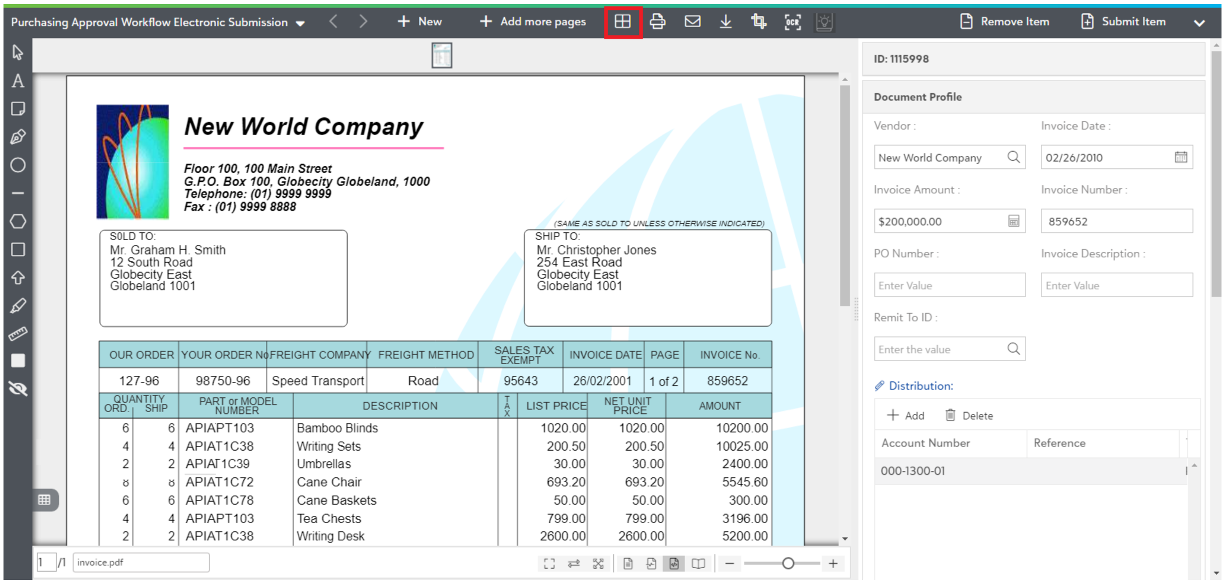
Tip: Click on icon to disable the Image page options toolbar. Once the Image page options toolbar is disabled, Click on icon to access it again.

Page Manipulation View

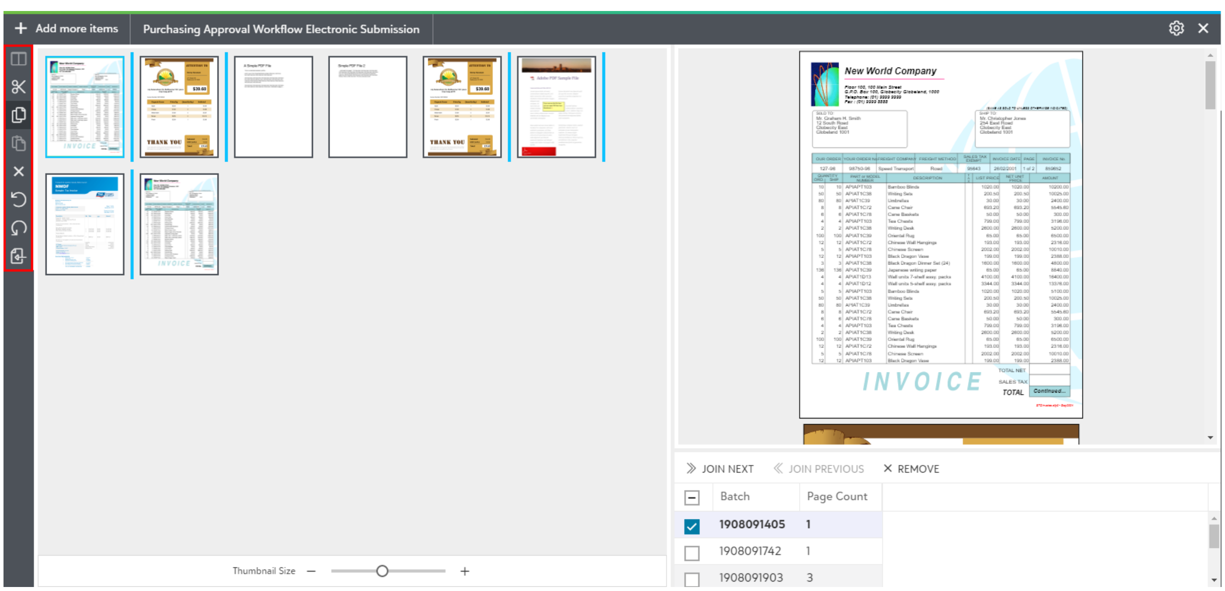
The Area offers a thumbnail view for all the unsubmitted items in the Page manipulation view. You can perform various operations on the thumbnails like split pages, cut or copy selected pages, paste those pages, remove unnecessary pages and rotate selected pages.

The following video covers how to

Click on the icon to access the Page manipulation view as shown in the below screen:



You will see the Page manipulation view with all the unsubmitted items arranged as thumbnails separated by a thick bar as shown below:



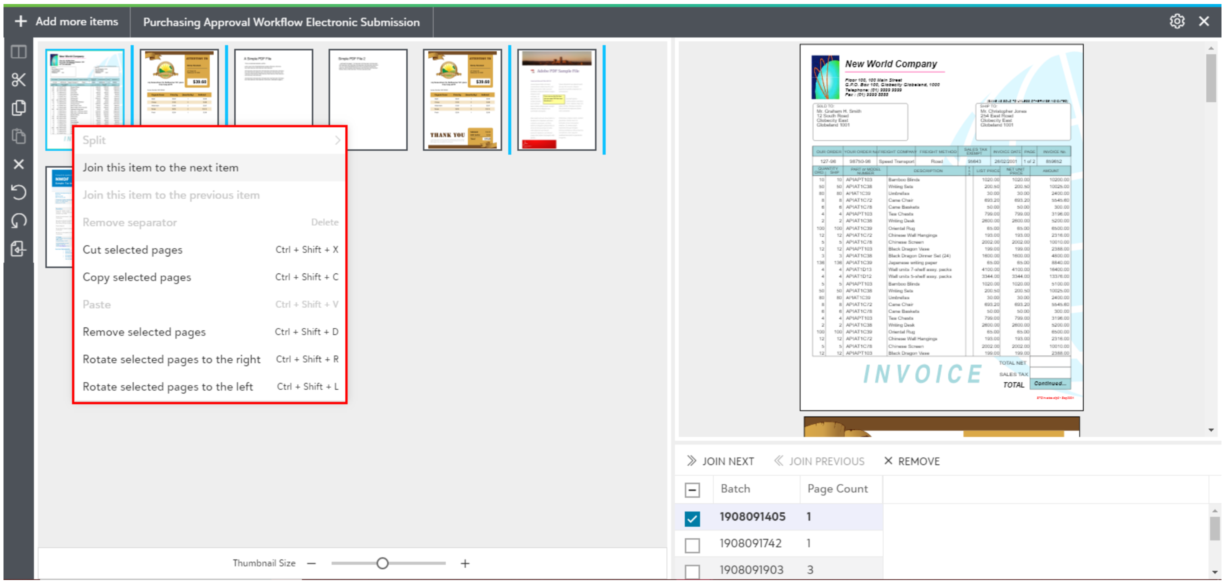
The operations in the toolbar are explained as follows:

- **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

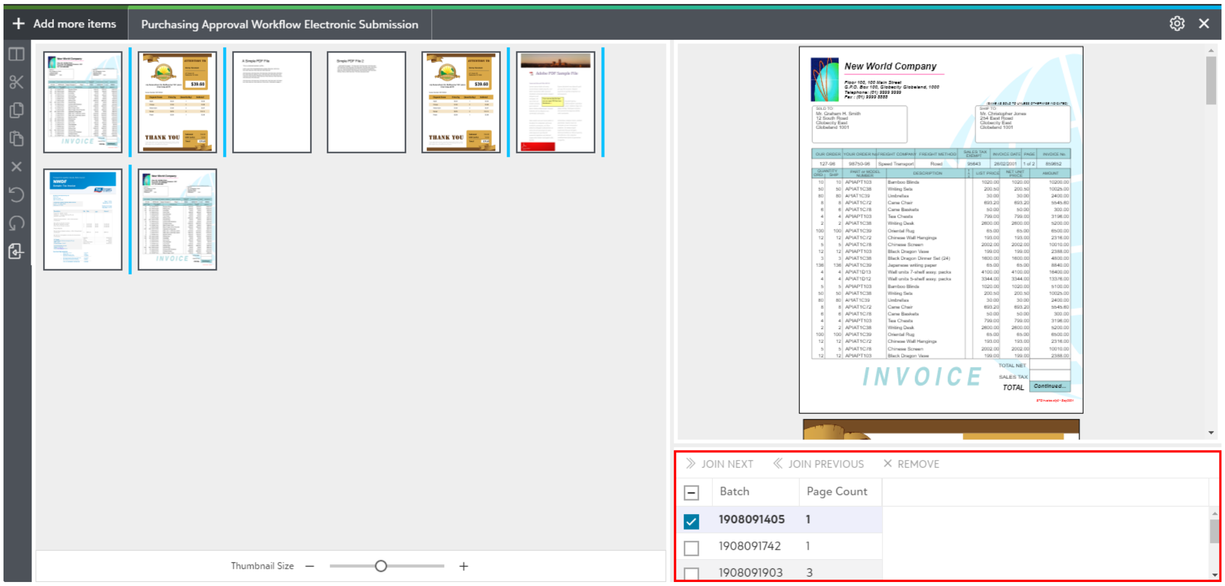
Right click on the thumbnail item to access the Context menu as shown below. You can view all the operations that can be performed with the selected thumbnail in the context menu.



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.

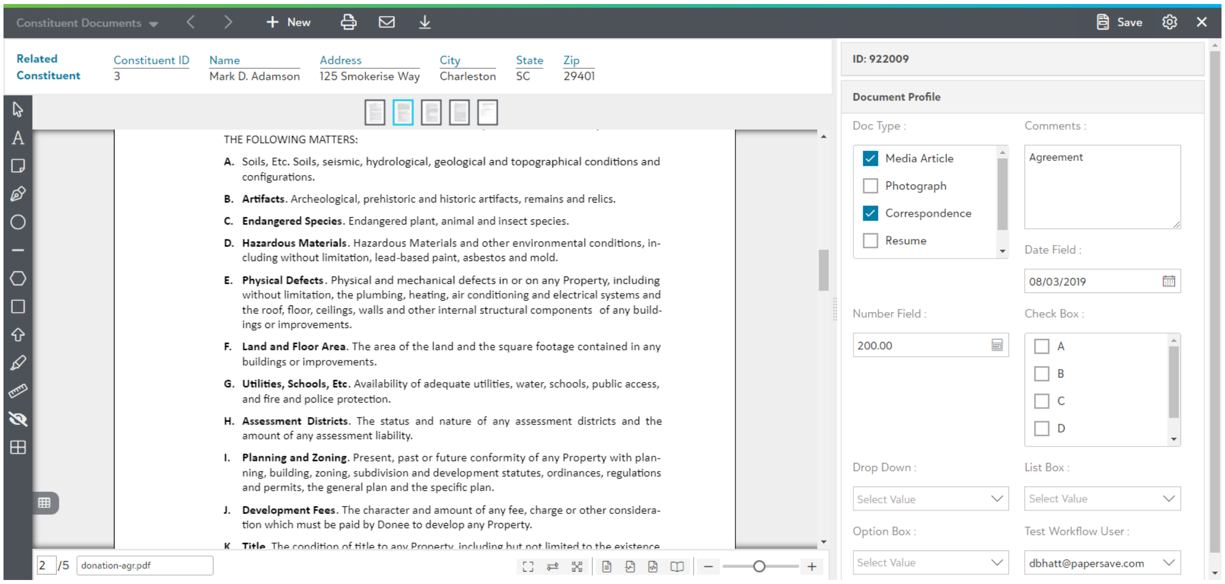
REMOVE: This option discards the selected page from the list.

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:

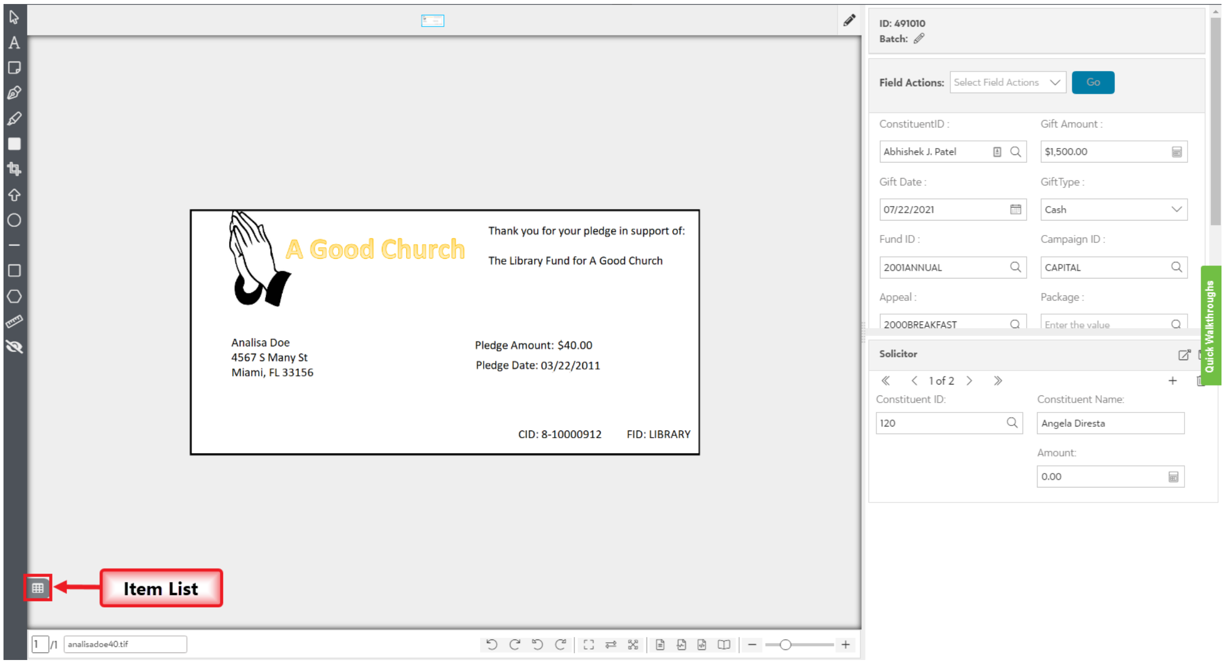
- **Using Image page options for unsubmitted items**

  The following video explains the how to use Image annotations for unsubmitted items in the Browse Area.

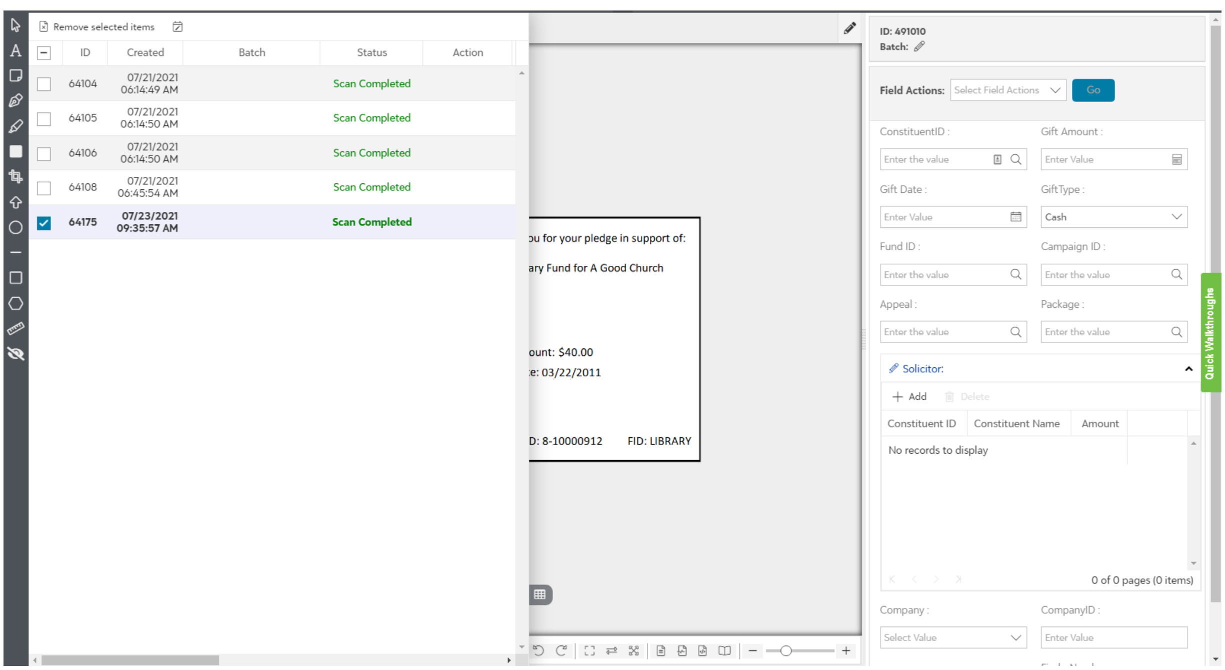
- **Save an acquired document from the item viewer**

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:

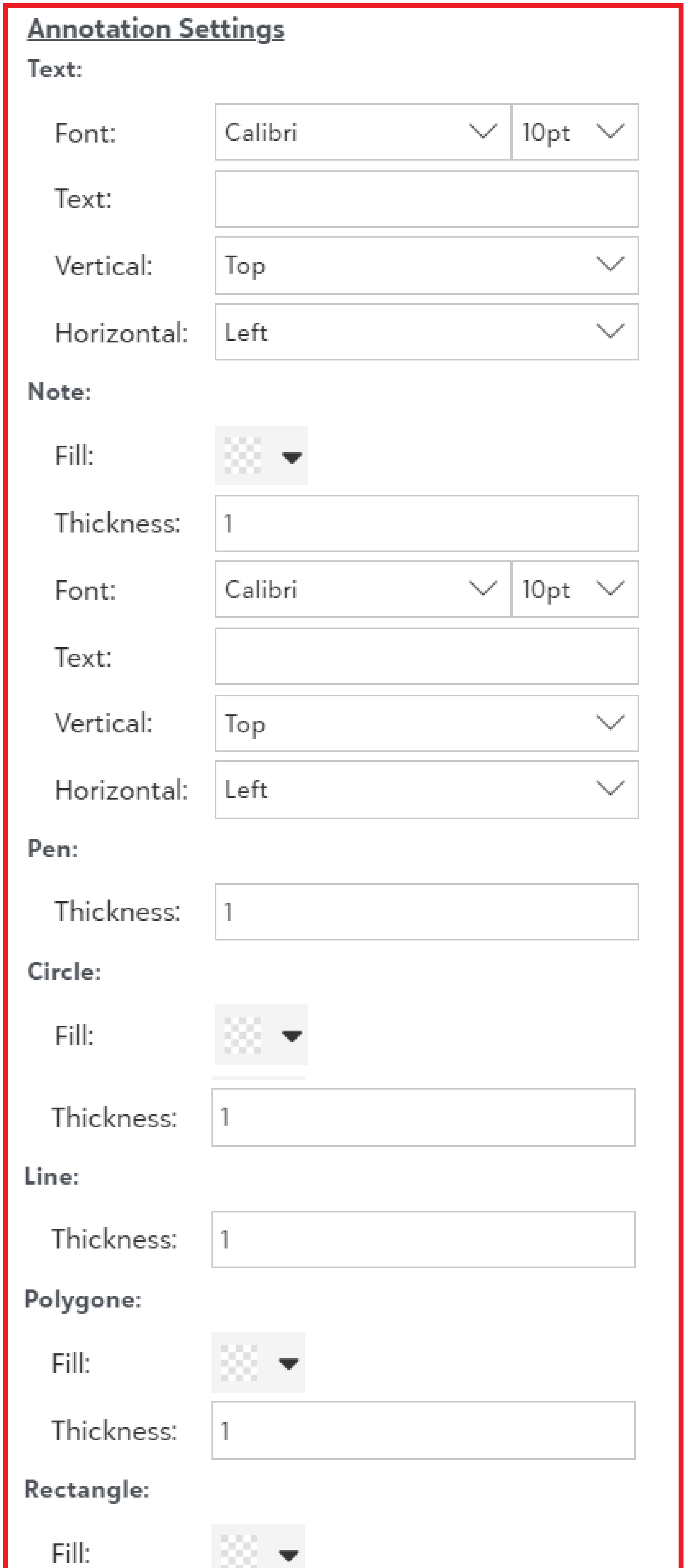


- Double click on the desired item from the list to open it in the item viewer.

> **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:
Vertical: Top
Horizontal: Left
Note:
Fill:
Thickness: 1
Font: Calibri 10pt
Text:
Vertical: Top
Horizontal: Left
Pen:
Thickness: 1
Circle:
Fill:
Thickness: 1
Line:
Thickness: 1
Polygone:
Fill:
Thickness: 1
Rectangle:
Fill:

Text, Note: Select font, font size, default text, vertical and horizontal alignment.

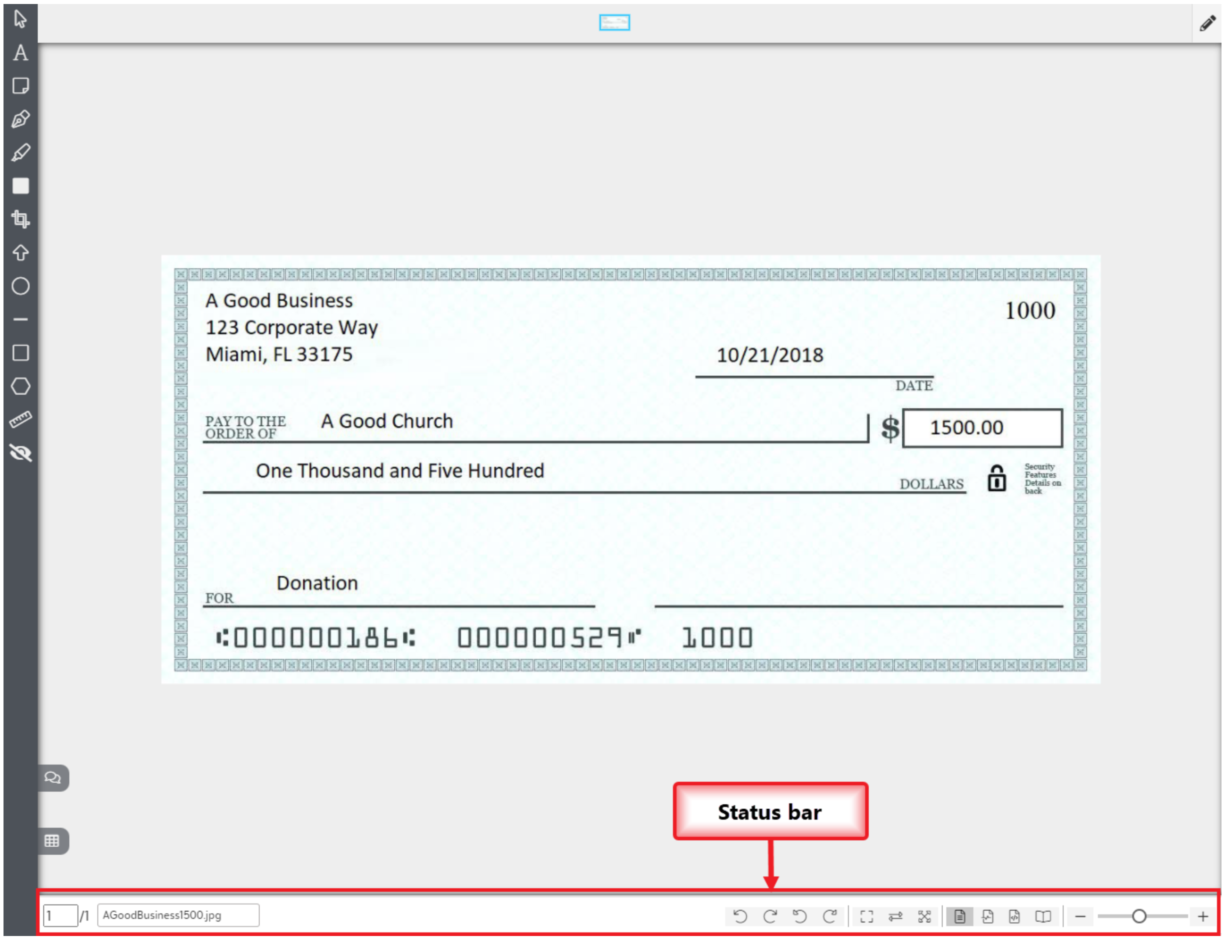
Pen, Circle, Line, Polygon, and Arrow: Select the thickness and color.

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.

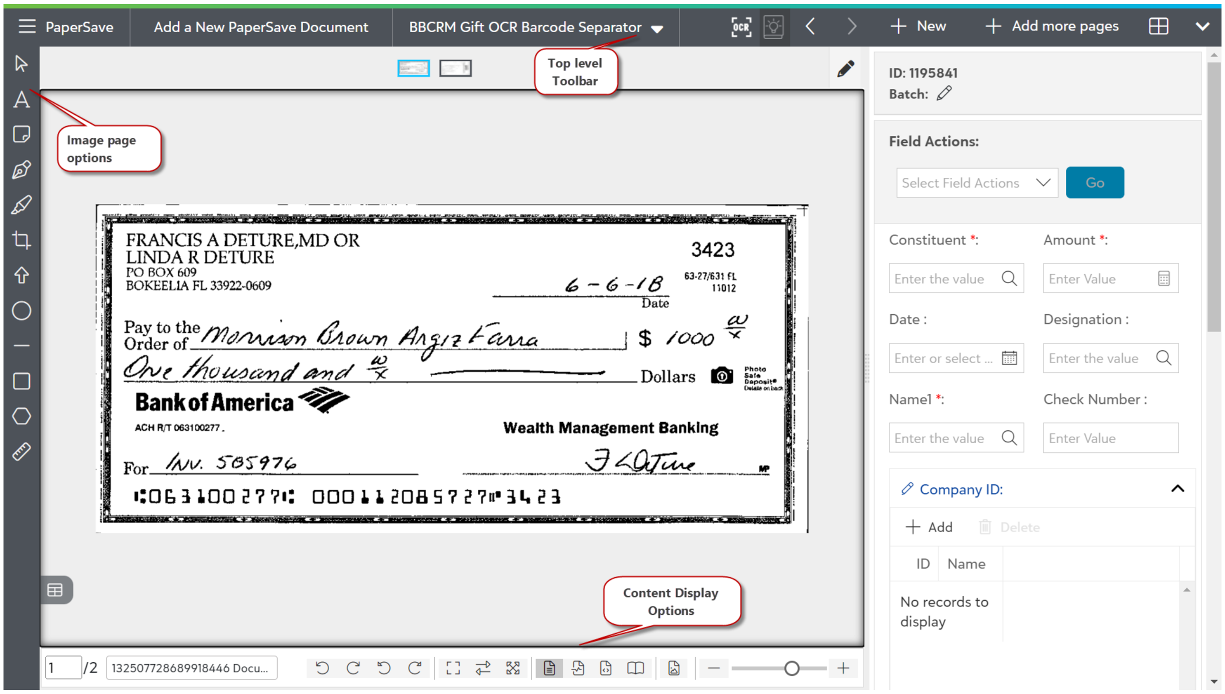
Zoom Slider: This slider will magnify or shrink the size of the item displayed on item viewer. Move the Zoom slider to increase/decrease the size of the item.

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.

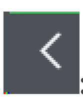
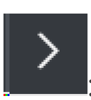
The below screen displays the various options available in the Item viewer for validating the Workflow item.



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:**

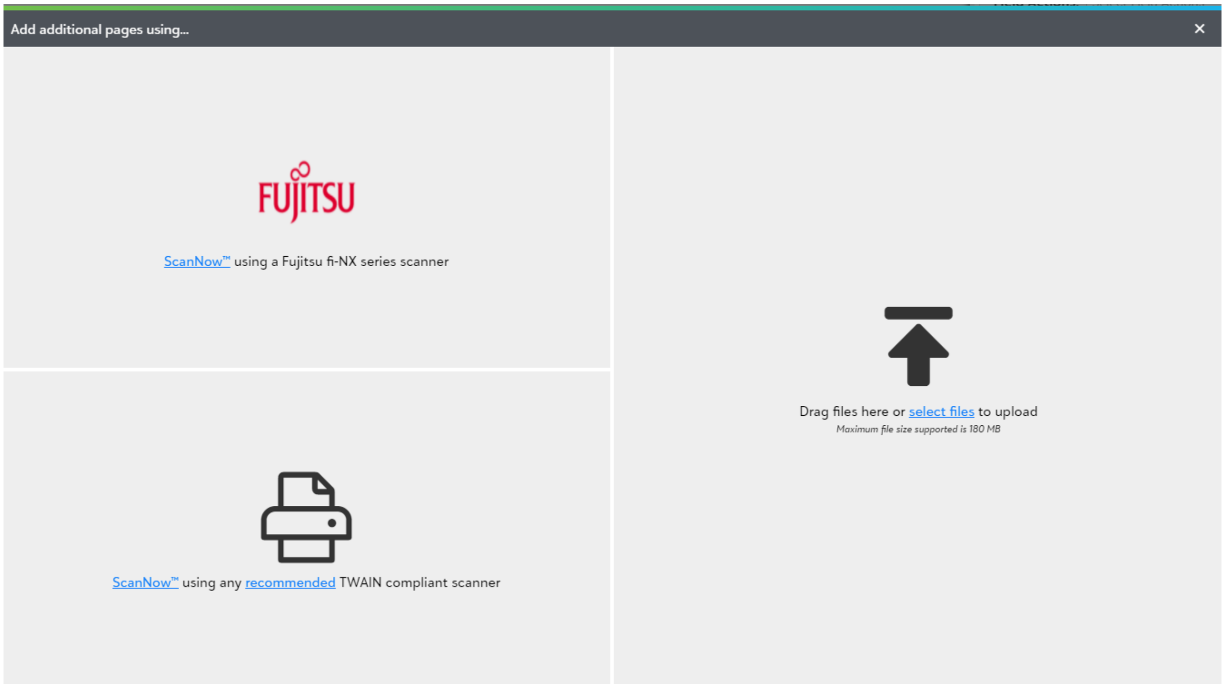
The following are the options in the top level toolbar of item viewer for unsubmitted items:

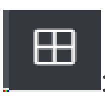
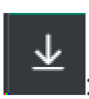
- : Click on this option to navigate to the previous unsubmitted item. It will be disabled if there is no previous item.
- :Click on this option to navigate to the next unsubmitted item. It will be disabled if there is no next item.
- 

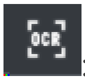
: Click on this option to switch to File capture options panel to acquire a new document.

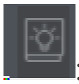
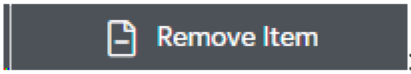
- 

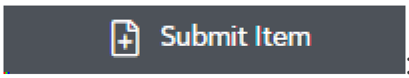
: Click on this option to add more pages to the current document. clicking on this option will display the following "Add additional pages" prompt.



- : 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.
- 

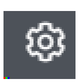
: Click on this option to submit items selected in the unsubmitted item list.

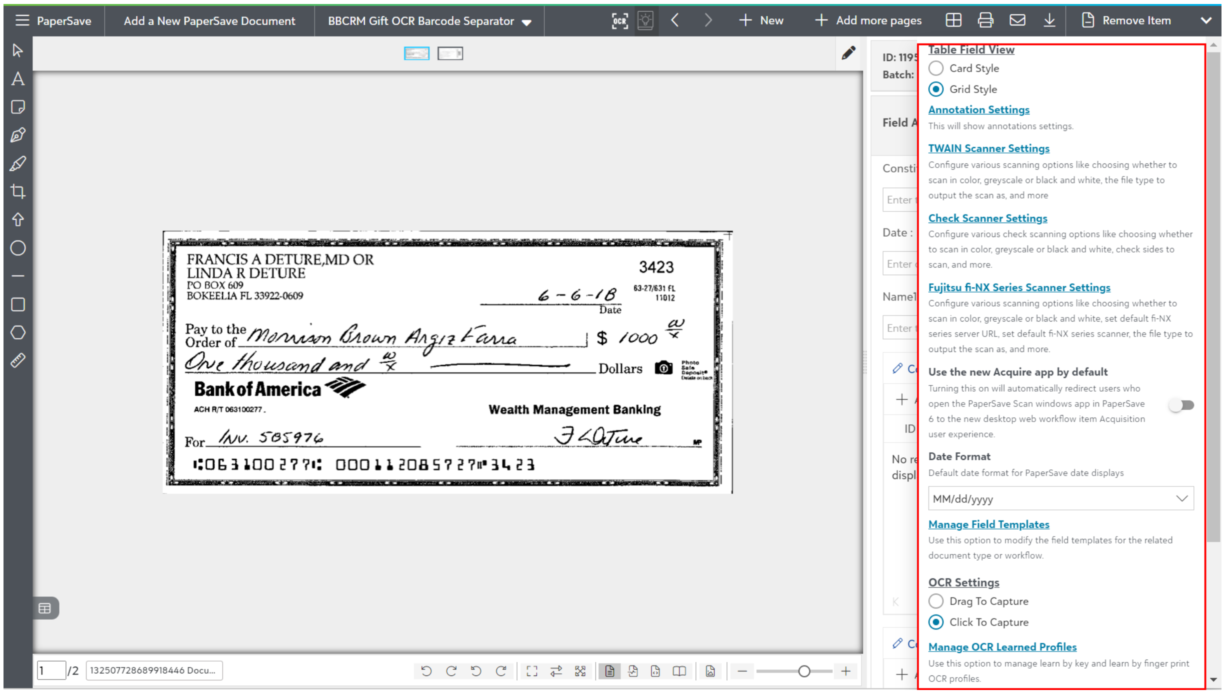
2)**Using Image page options(Annotations) for Unsubmitted items**

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:



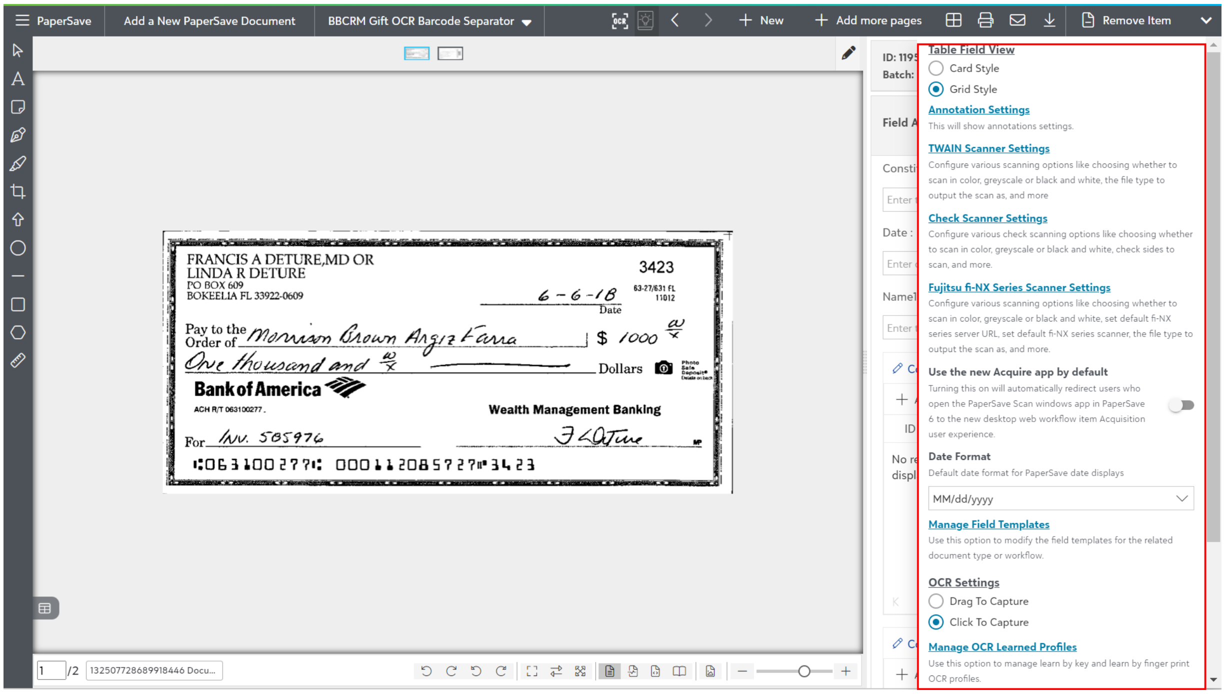
The following is the brief description of various preferences in the Settings panel:

a) **Table Field View**

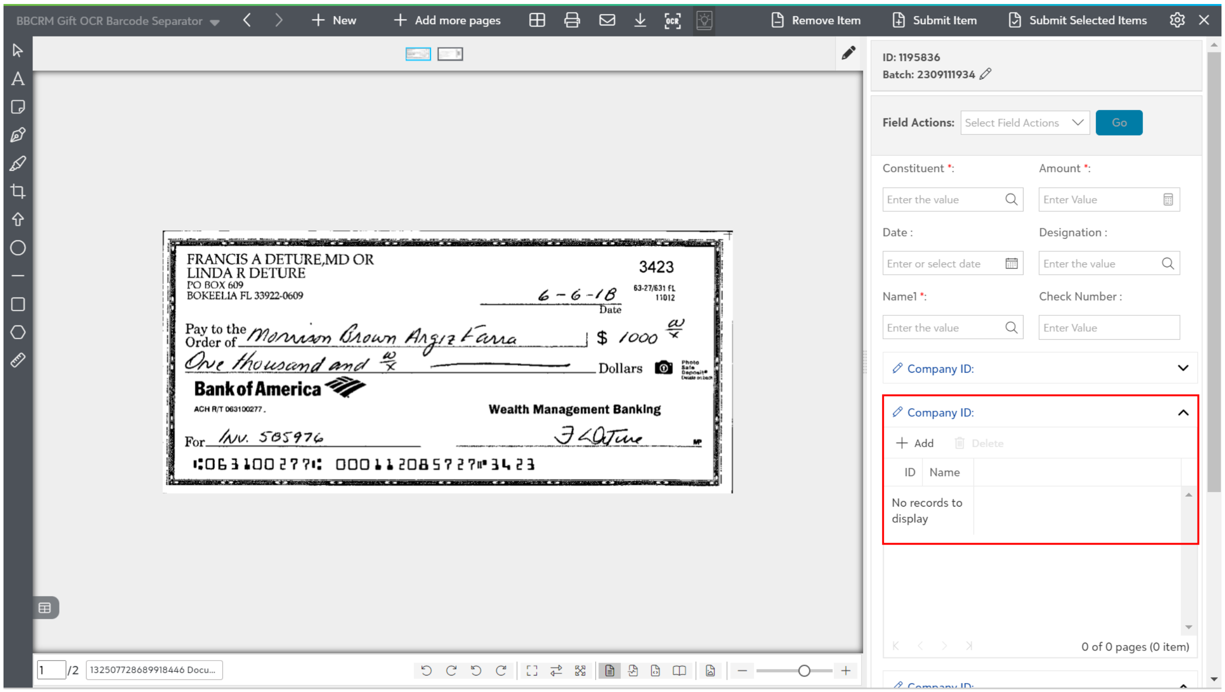
PaperSave offers a widget with two different user interfaces (card style and grid style) for the table type fields in the document profile field panel. Card style is set as the default option.

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:

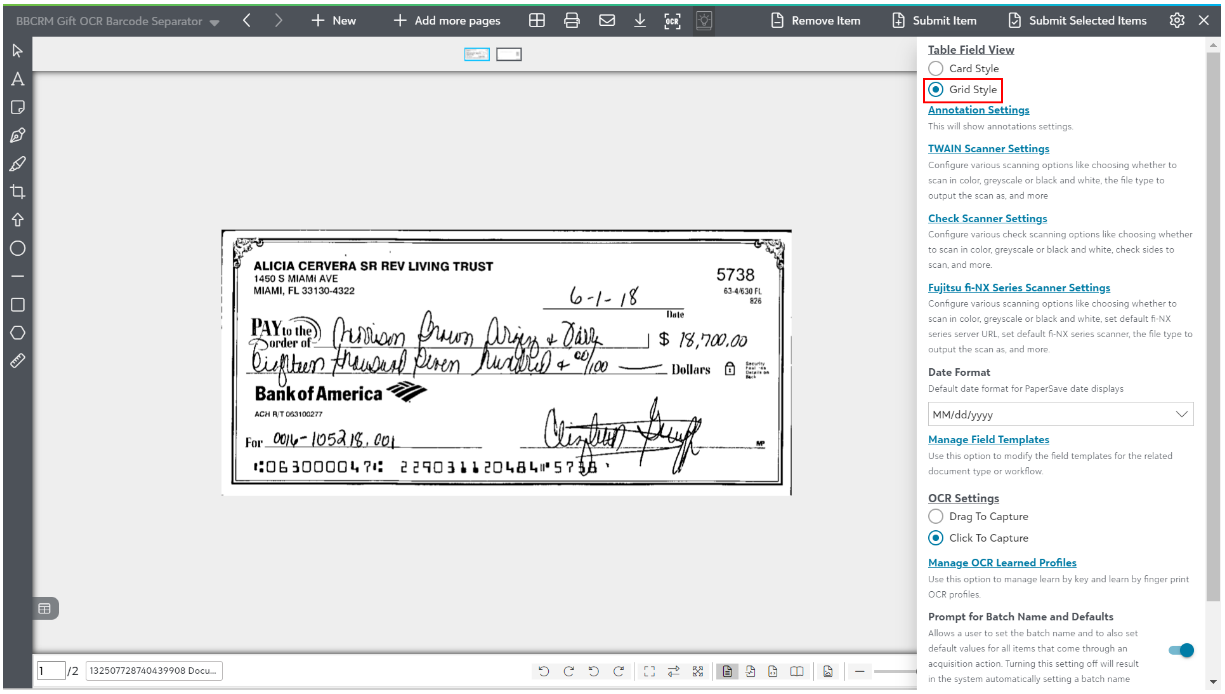


- You will see "**Card Style view**" for the Table type fields in the document profile field panel while editing the field as shown below.

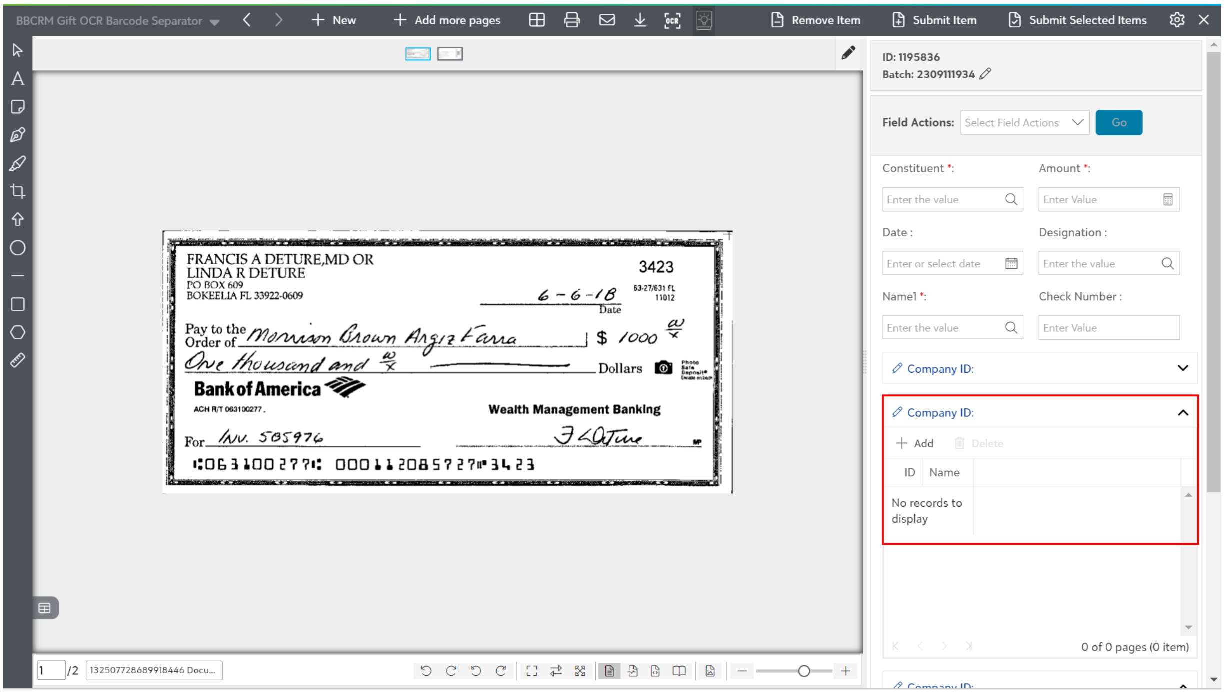


b) **Grid Style**: It switches the "table type field" widget to Grid style view.

- Select the Grid style option in the Table field view Settings as shown below:

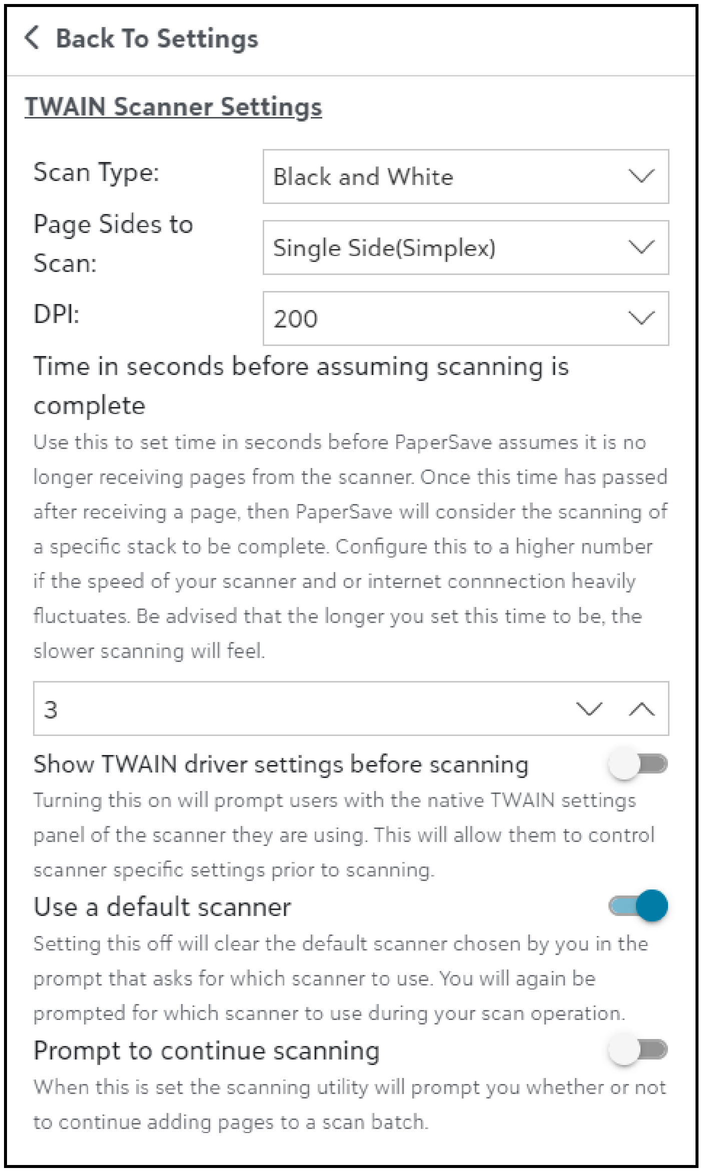


- You will see "**Grid Style view**" for the Table type fields in the document profile field panel as shown below.



b) **Annotation Settings**

This Setting option enables you to adjust the following preferences for each annotation tool in the Workflow Item Viewer.



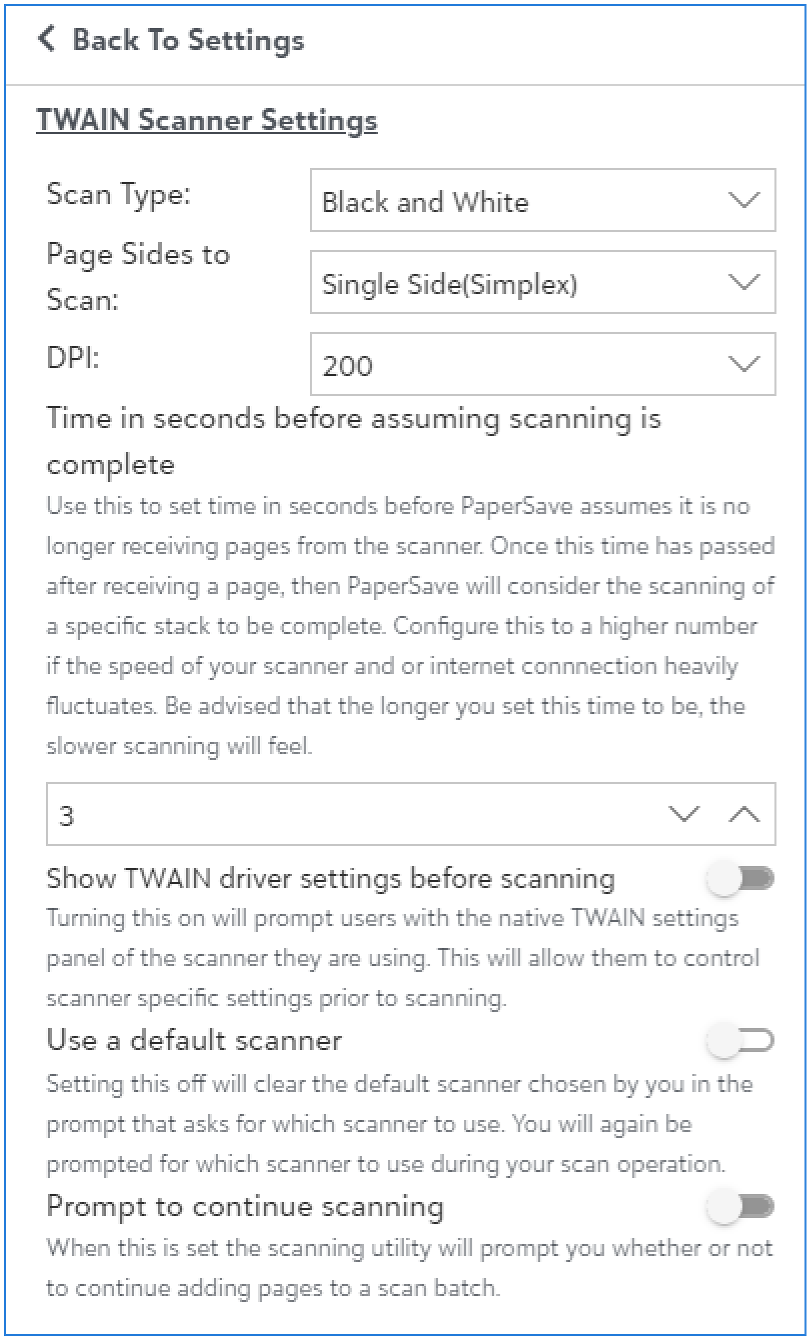
Text, Note: Select font, font size, default text, vertical and horizontal alignment.

Pen, Circle, Line, Polygon, and Arrow: Select the thickness and color.

Highlighter: Select the color.

c)**Twain Scanner Settings**

This Setting option enables you to configure the following scanner related preferences as shown below:



- **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**

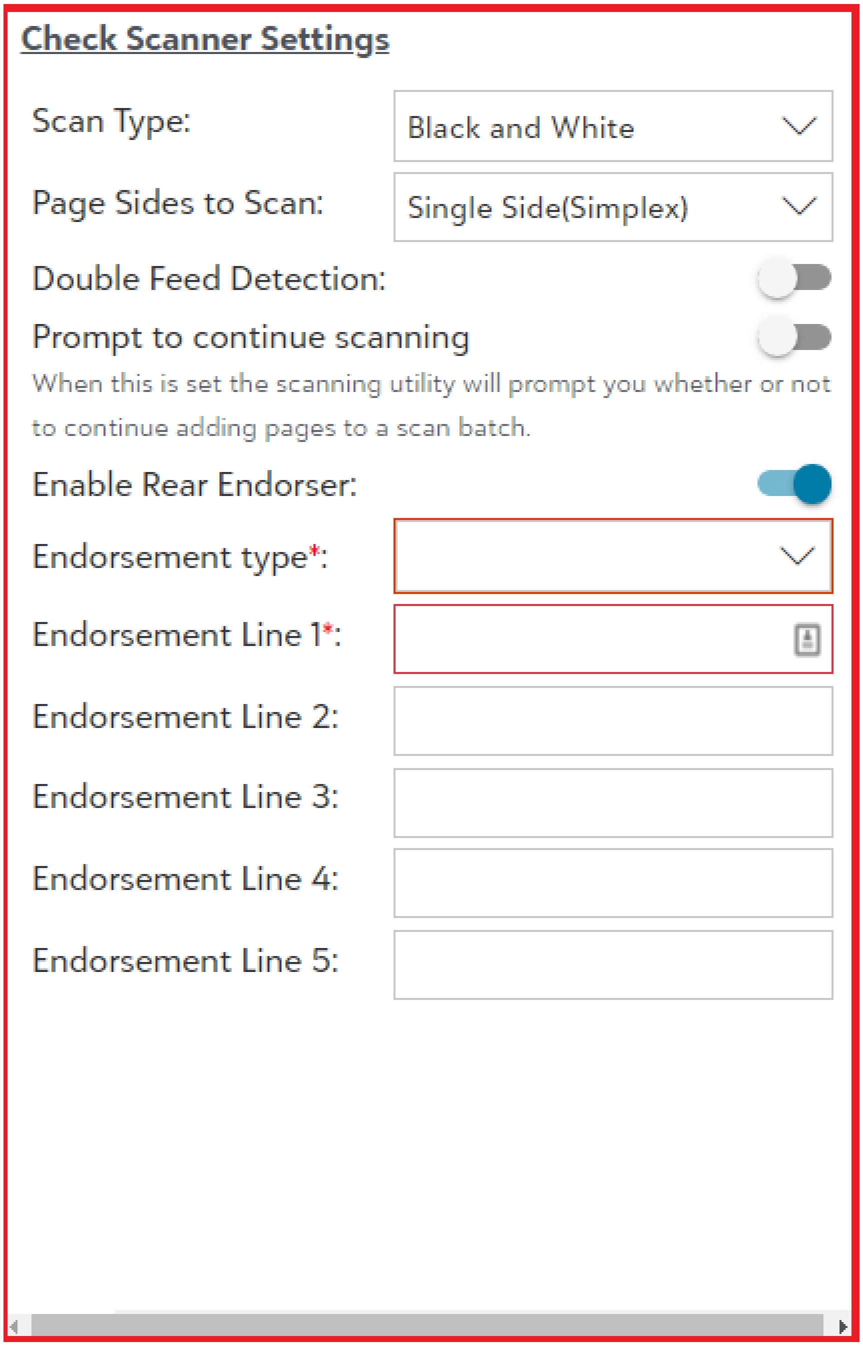
Setting this off will clear the default scanner chosen by you previously, and you will be prompted for which scanner to use. You will again be prompted for which scanner to use during your scan operation.

- **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:



- **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.

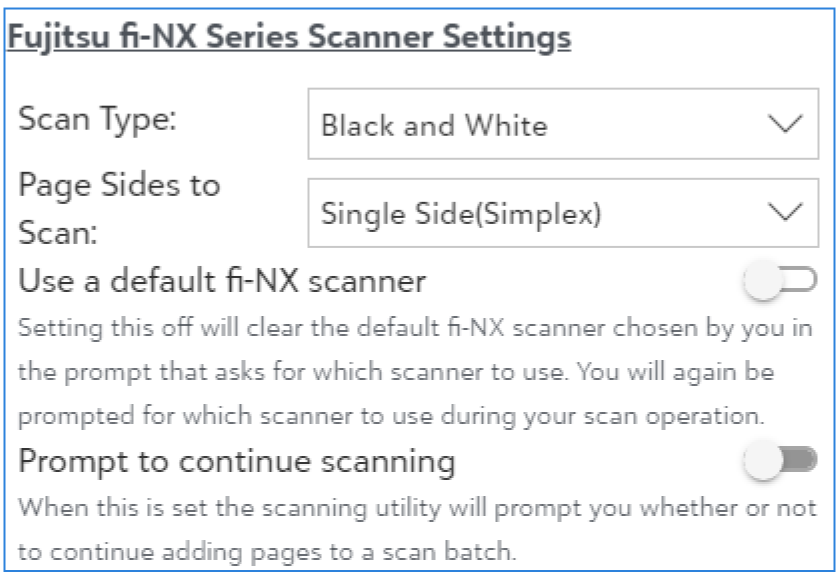
- **Endorsement Line 1 to Endorsement line 5:**

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:



- **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.

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**:

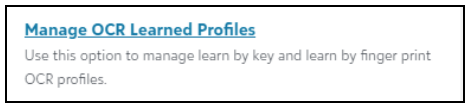
This Setting option enables you to configure OCR-related preferences in the Workflow item viewer, as follows. Set the preference to use the drag or click action to correct the profile fields values on items processed by OCR.

- **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.

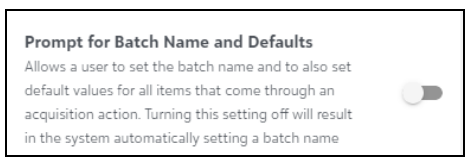
j) **Manage OCR Learned Profiles**

You can use this option to manage the OCR learn by key and learn by finger print OCR profiles.



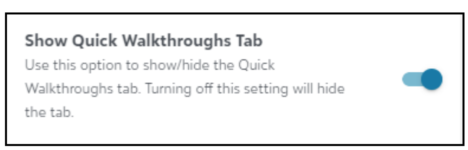
k) **Prompts for Batch Name and Defaults**

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.



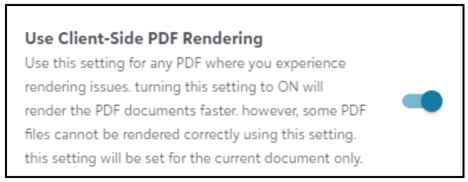
l) **Show Quick Walkthrough Tab**

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.



Review and edit Profile fields

The field panel in 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.

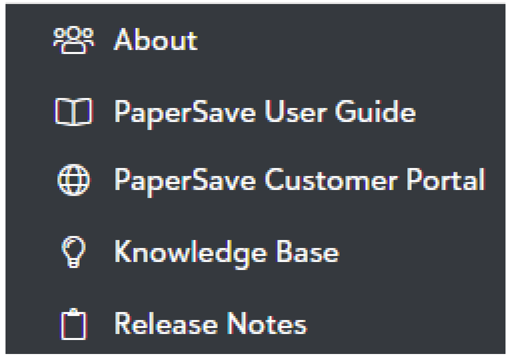
Correcting fields using Drag to Capture tool

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

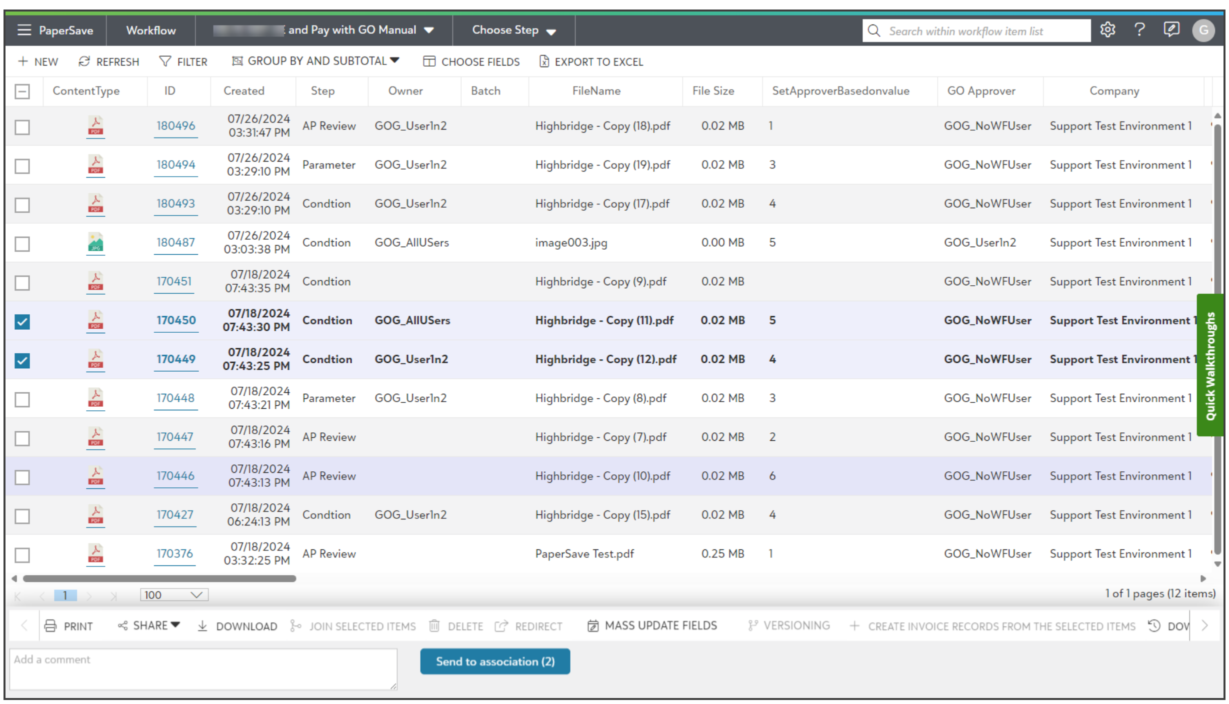
Now, PaperSave has started supporting the user to set a “Group” as the “Target Owner” while designing the Workflow. Click here to learn how to set "Group " as the owner of the Workflow. This document gives information about the behaviour when the group member accesses the Workflow item within the “Workflow Item List”.

The following topics are covered in this section:

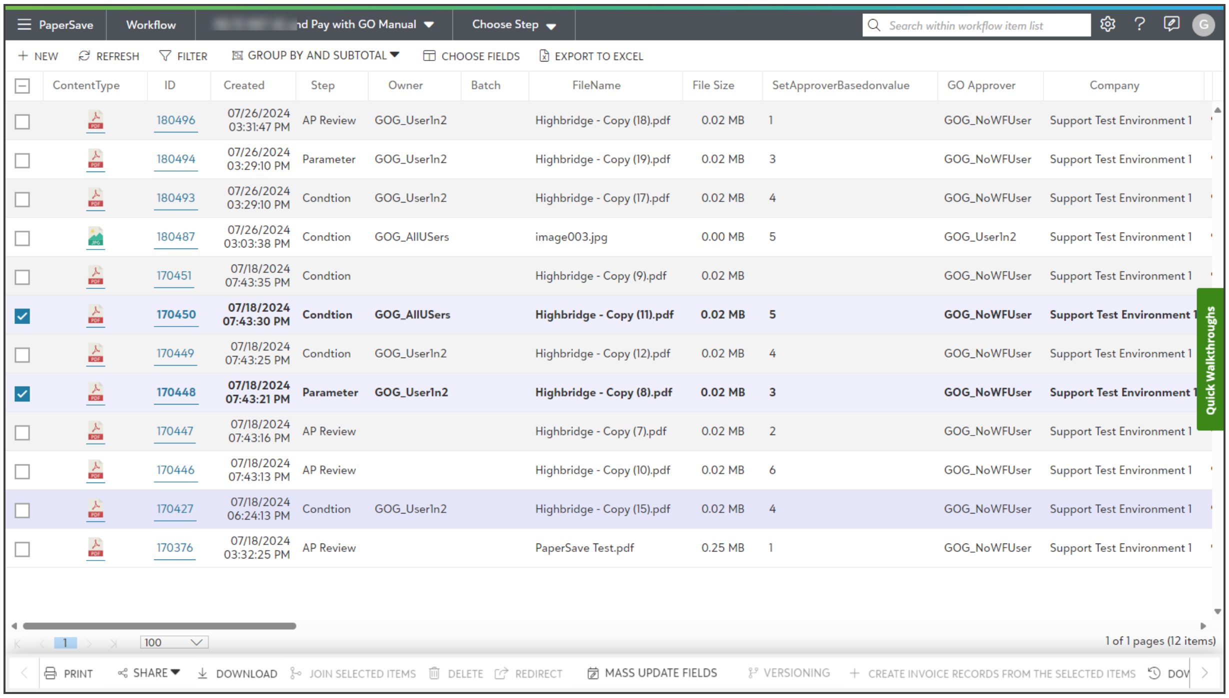
- Accessing the Workflow Items owned by the Group
- Raising the Workflow events for the Group owned Workflow
- Accessing the Group owned Workflow Item from Email Notification

Raising the Workflow events for the Group owned Workflow

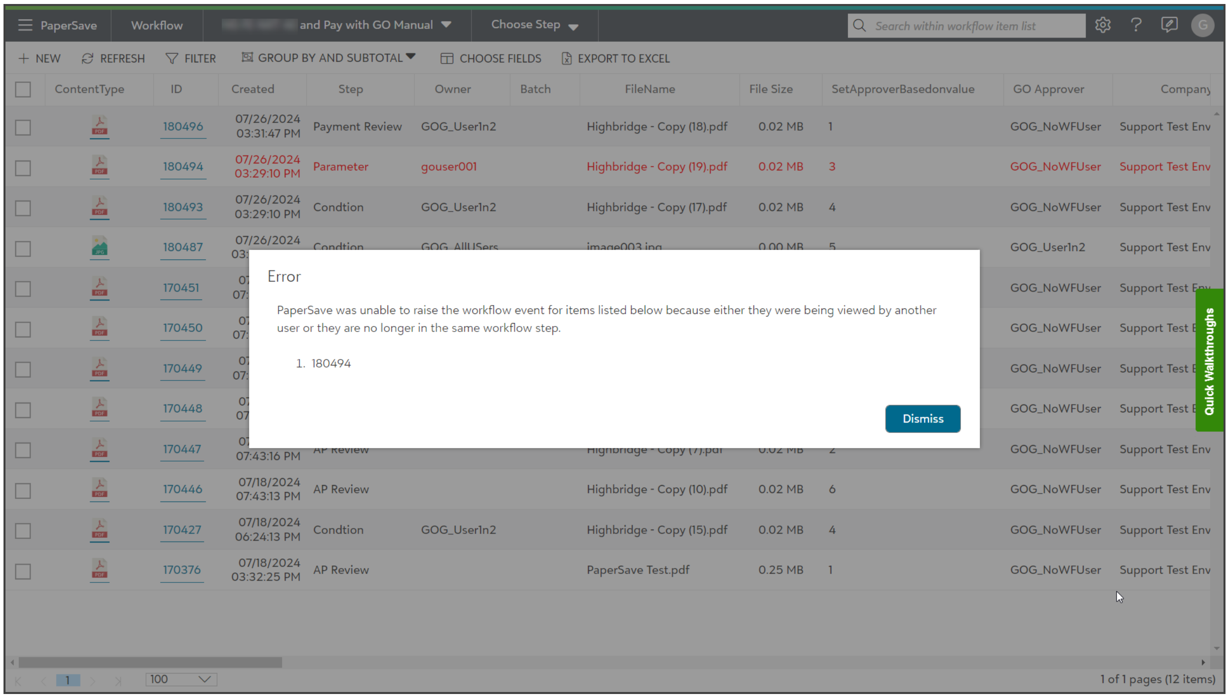
1) When multiple Workflow items are selected, the system checks if any items are being accessed by another group member. If none are accessed, users can raise bulk events and use toolbar options.



2) If any group member is accessing any selected Workflow item, event buttons and toolbar options will not be displayed as shown below.

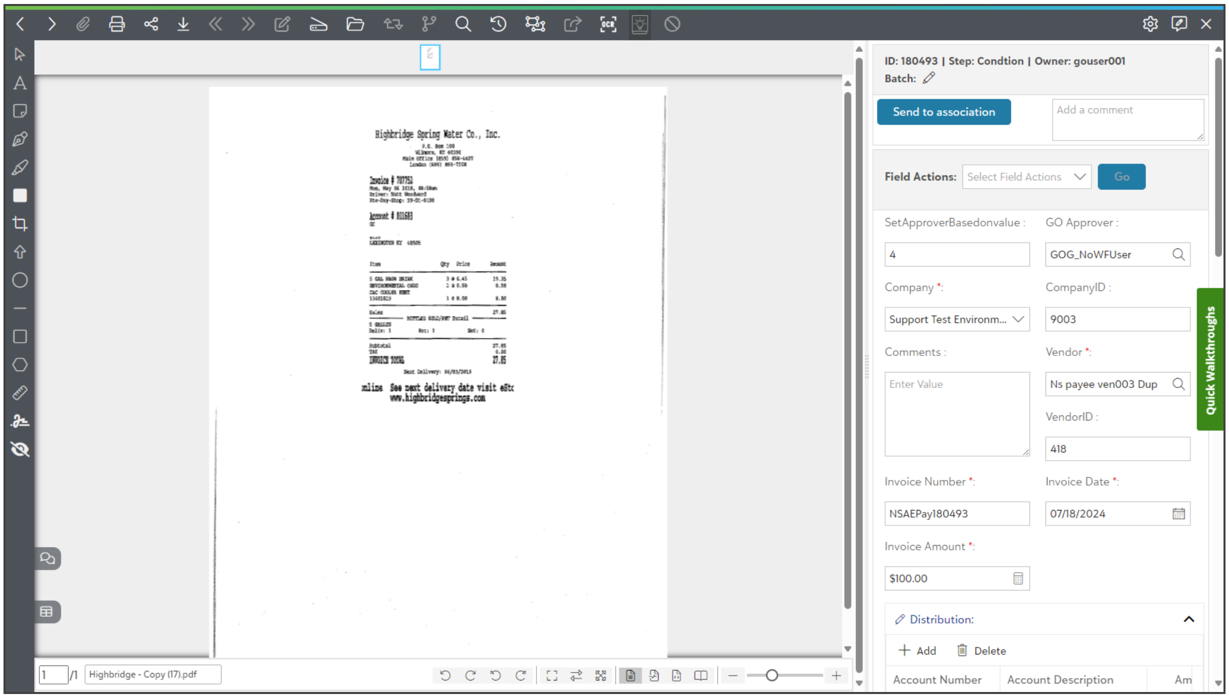


3) If multiple members raise an event for the same item, only the first action is considered, and subsequent actions are disregarded with a "PaperSave was unable to raise the Workflow event" dialog; similarly, when a group member selects items being viewed by others and tries to raise a bulk event, it proceeds only for items not being viewed, with a notification listing the items for which the event cannot be raised as shown below.

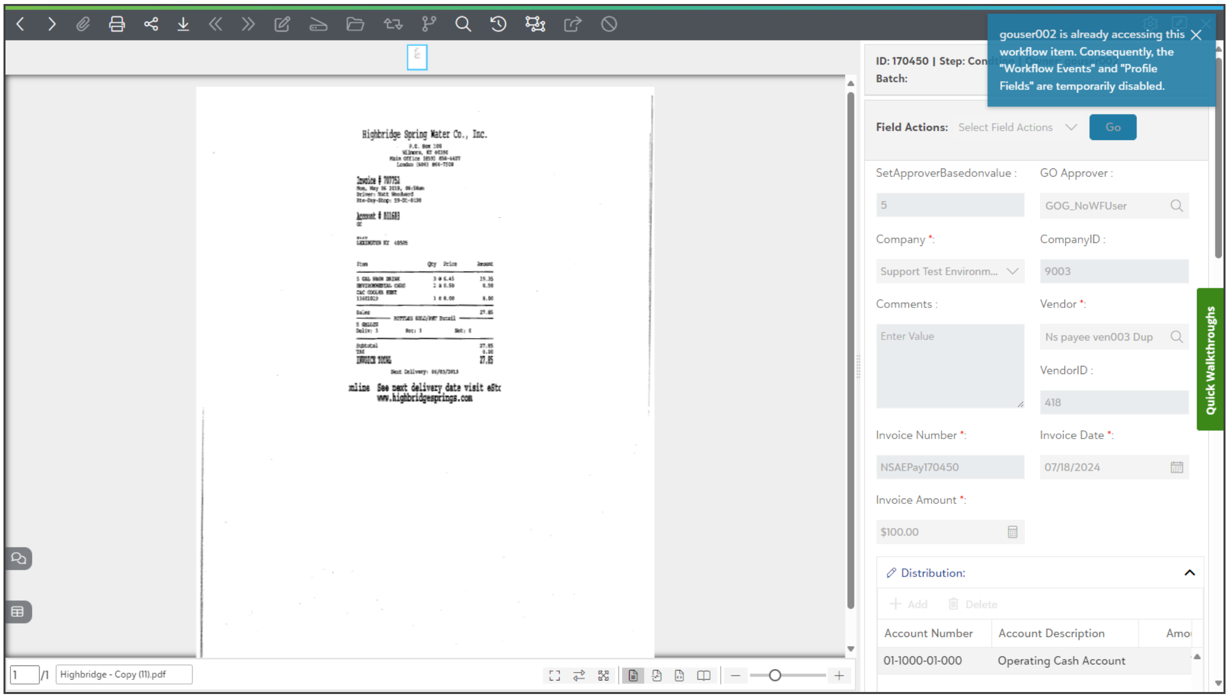


Accessing the Group owned Workflow Item from Email Notification

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.



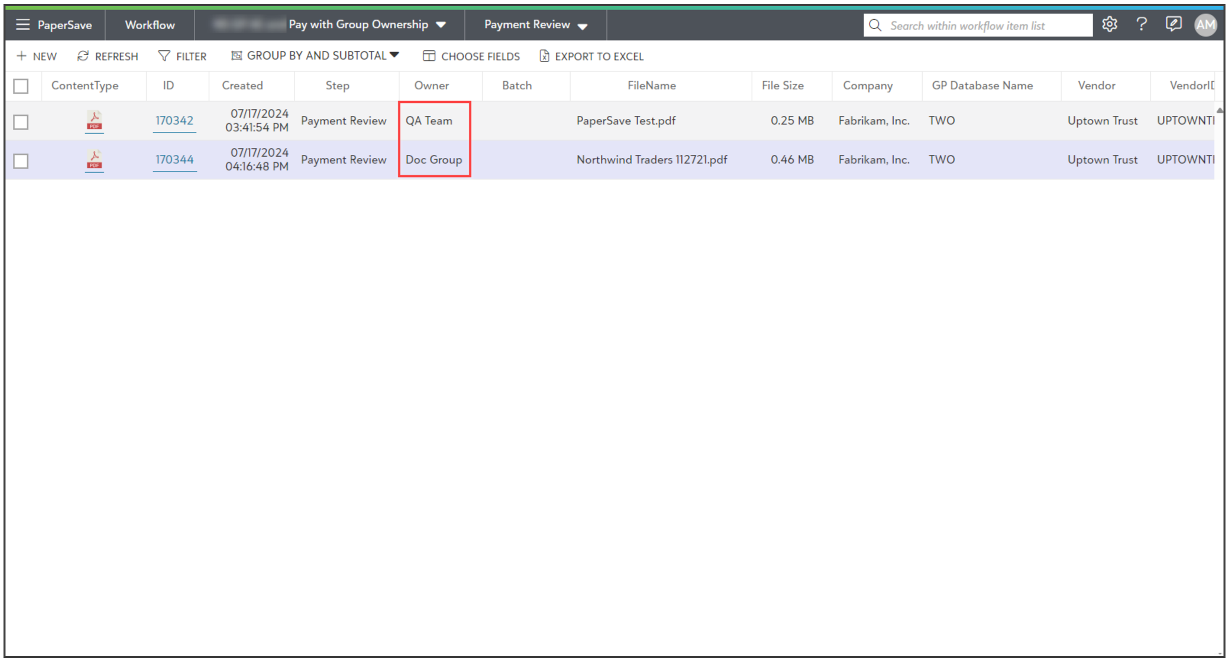
2) If another member has already opened the item, the current user will see the Workflow item in a read-only mode with hidden event buttons as shown below.

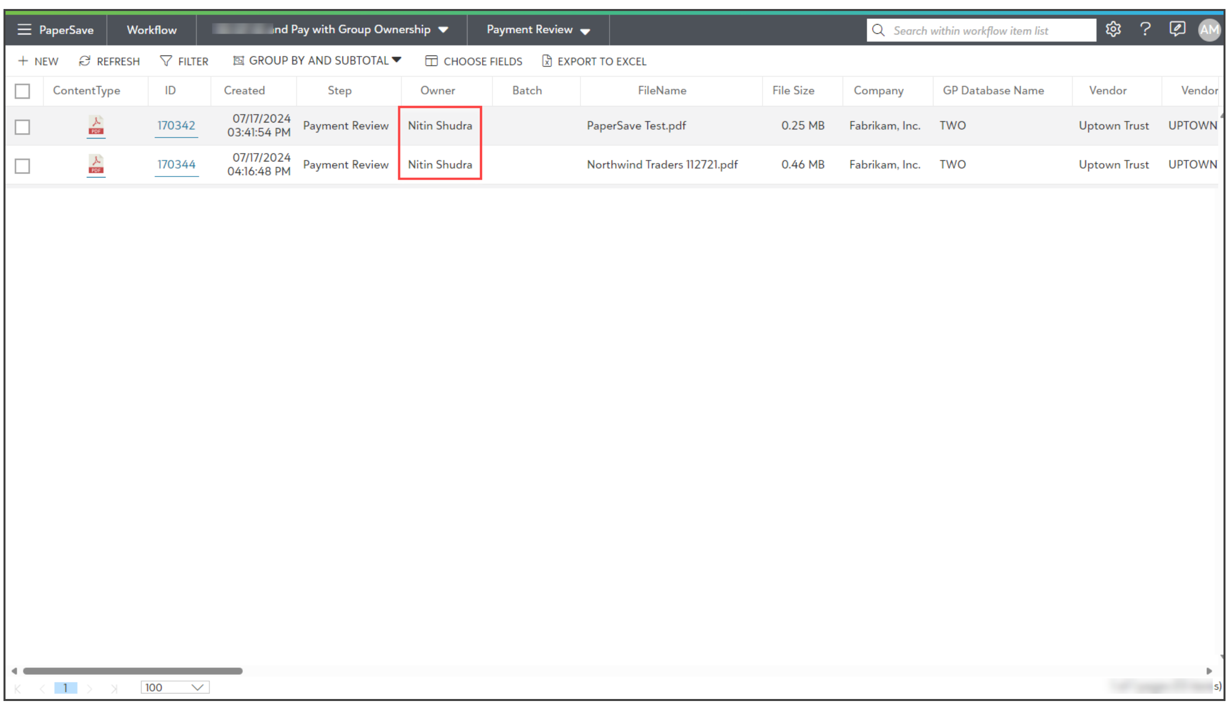


> **Note:** The first group member to open the Workflow item is considered as the owner, while subsequent members have read-only access to the opened Workflow items.

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.

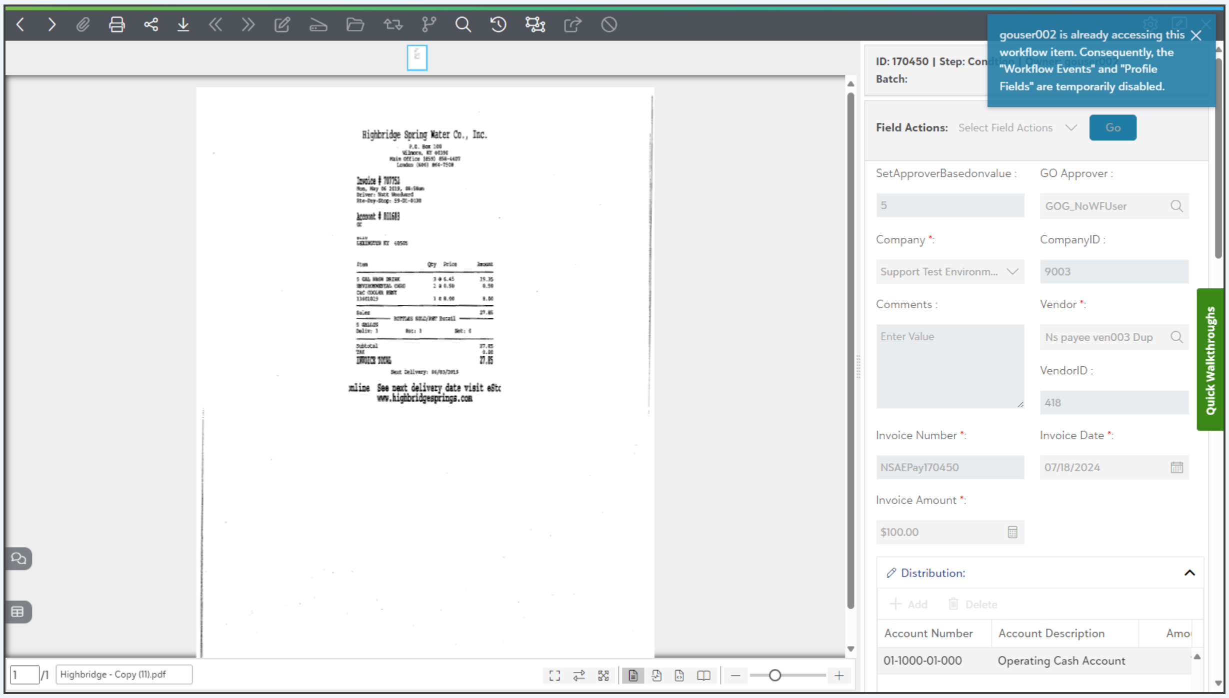




2) If another group member accesses the workflow after the previous member has finished, the new member becomes the owner, and the "Owner" column displays their name.

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.



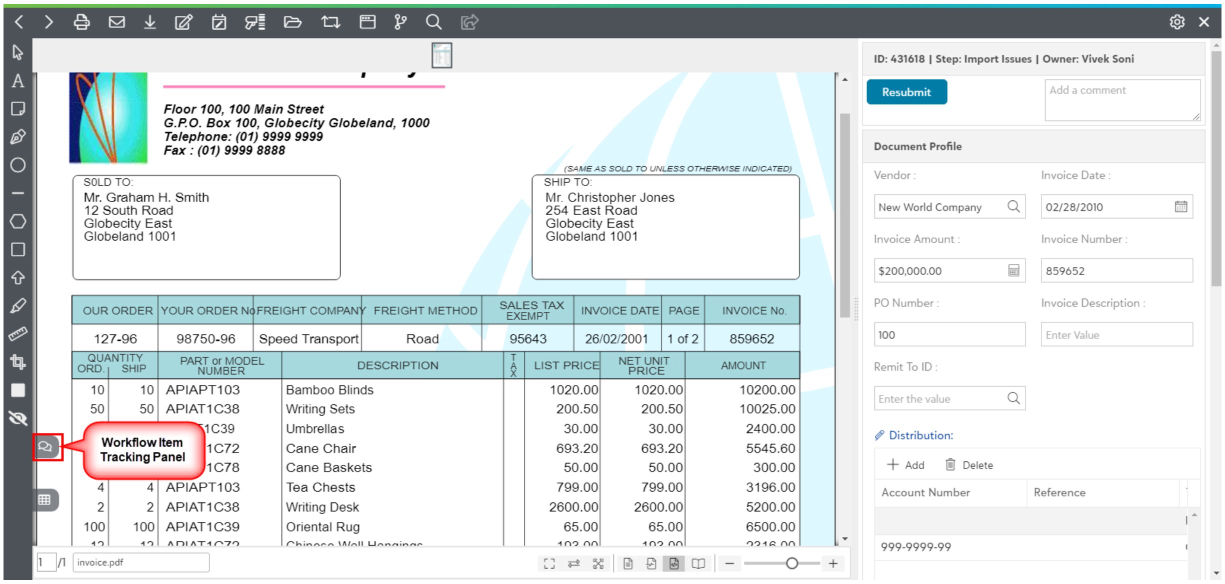
Tip: Privileged users such as Workflow Admins or Workflow Super Users, can view group-owned Workflow items without ownership transfer and restrictions. If they are also a group member then normal group member restrictions apply.

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.

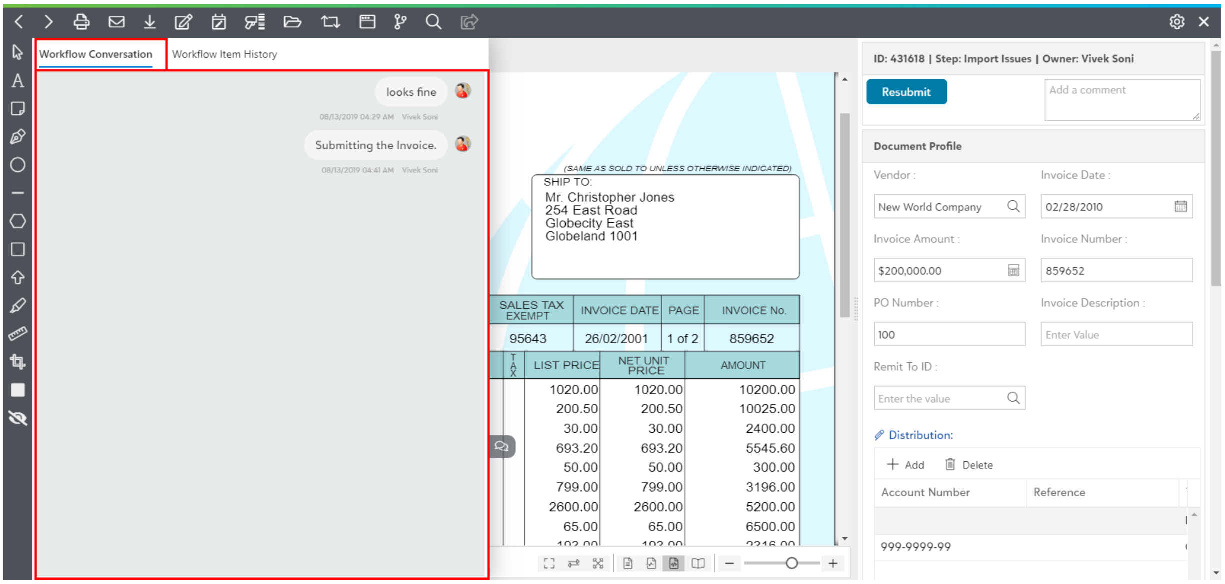
In the bottom-left corner of the screen, Click on the Workflow item Tracking panel icon  to access the Workflow Conversation and Workflow item History.



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.

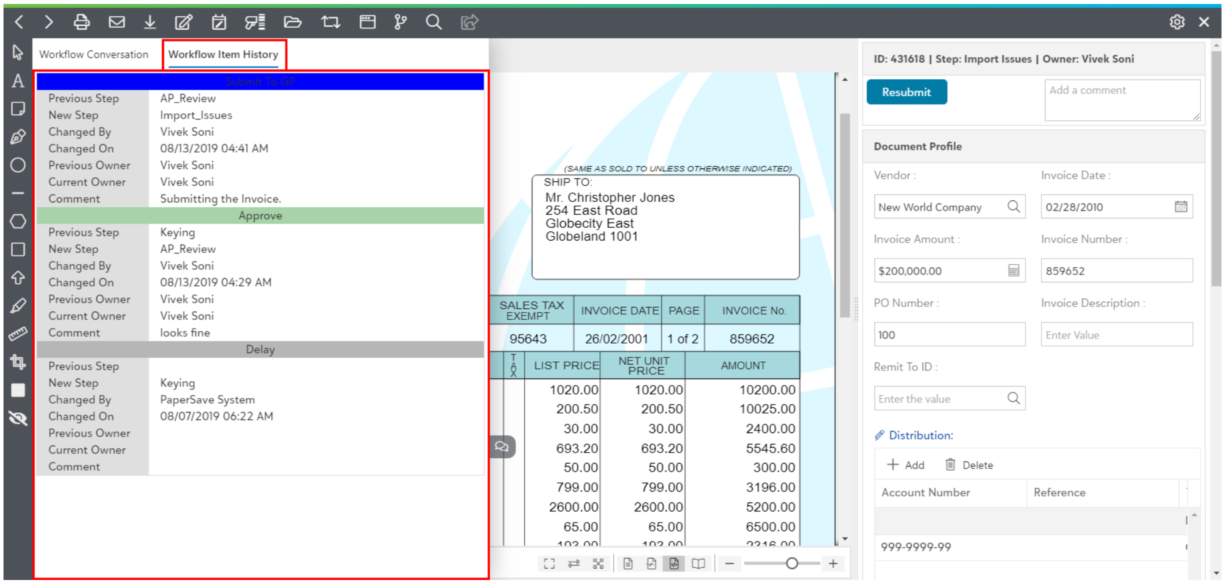
Click on "**Workflow item Tracking panel**" icon in the Workflow item viewer to open the Workflow Conversation panel as shown in below screen.



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.



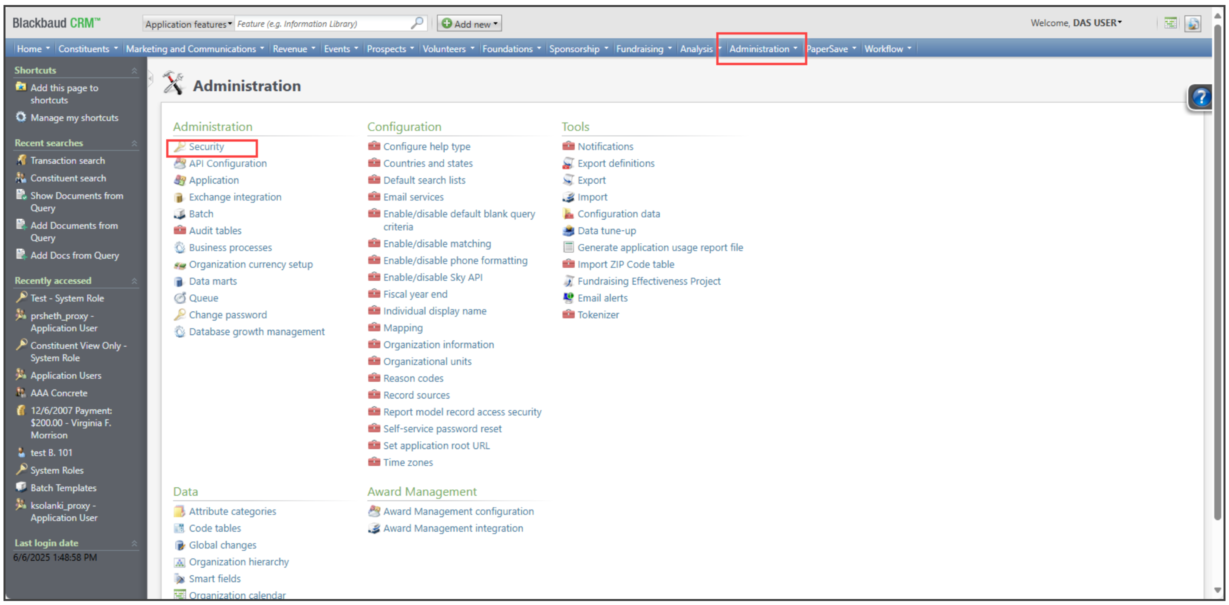
Workflow item history contains the below information regarding the changes for a Workflow item:

- **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/yyy 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.

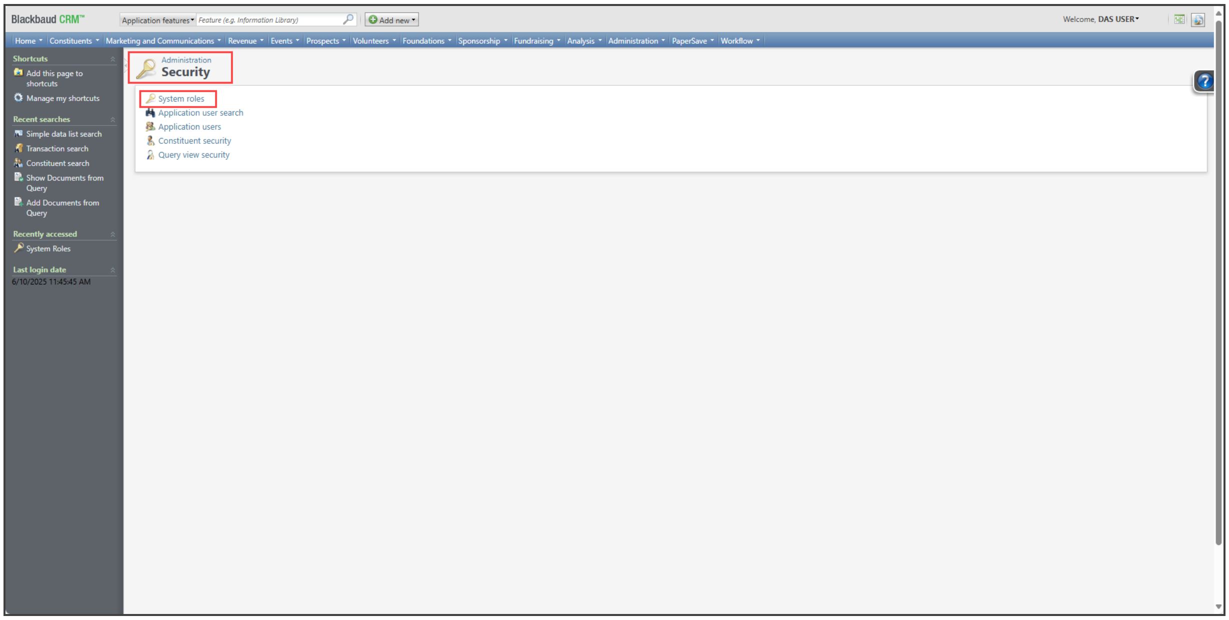
Creating System Role for the Proxy User in Blackbaud CRM

To create system role please follow the below steps

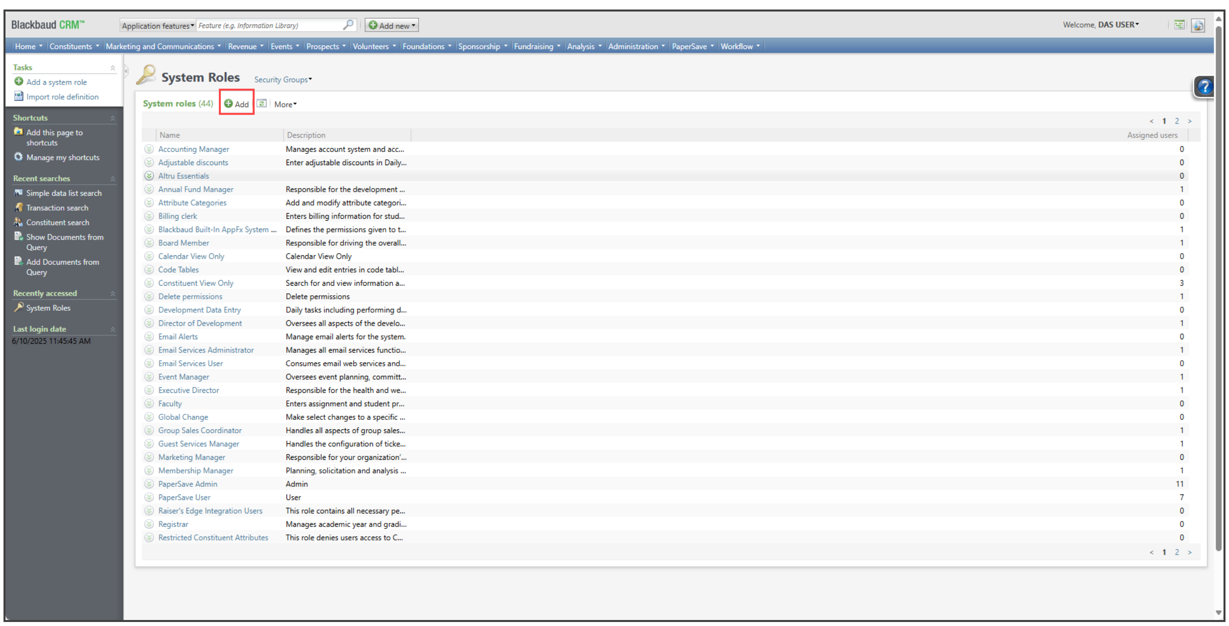
1) Open the Blackbaud CRM application, navigate to **Administration**, and select **Security**.



2) In the Security page, click on **System Roles** as shown below.

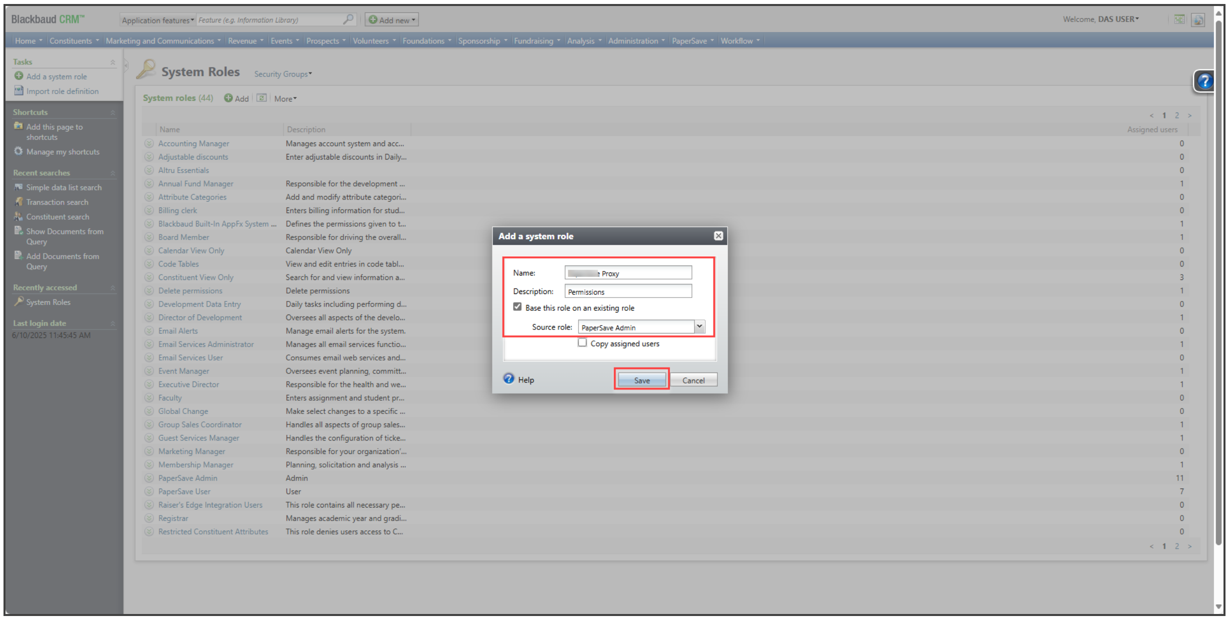


3) On the System Roles page, click on the **+ Add** option as shown below.



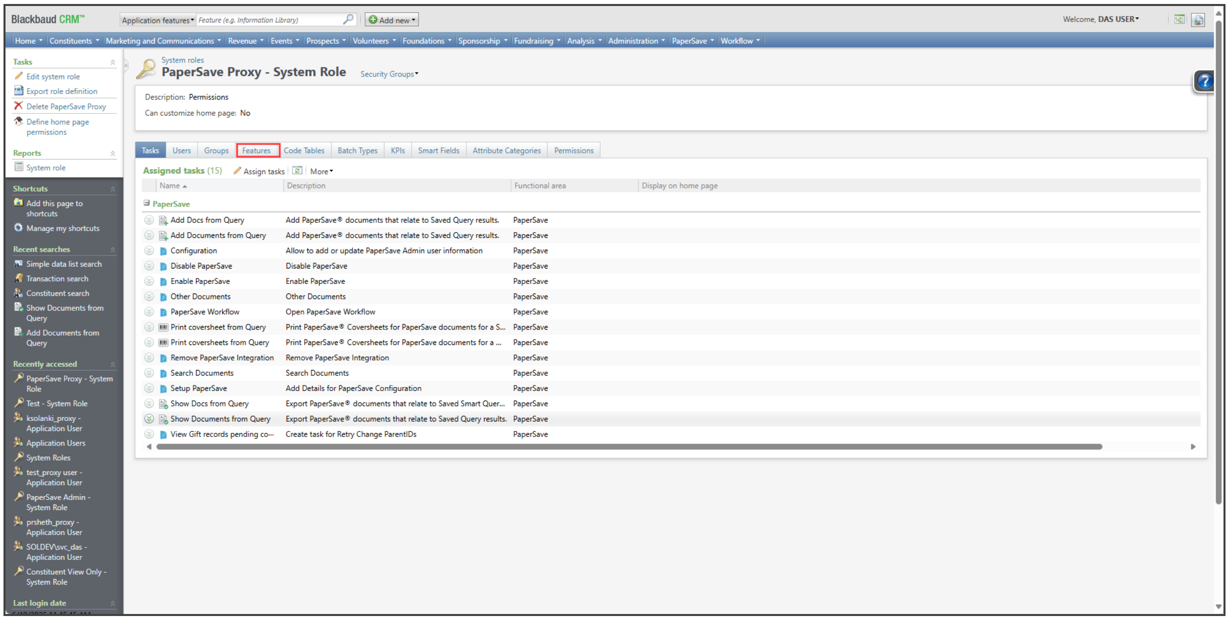
4) A confirmation dialog appears to add a system role as shown below.

- **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.

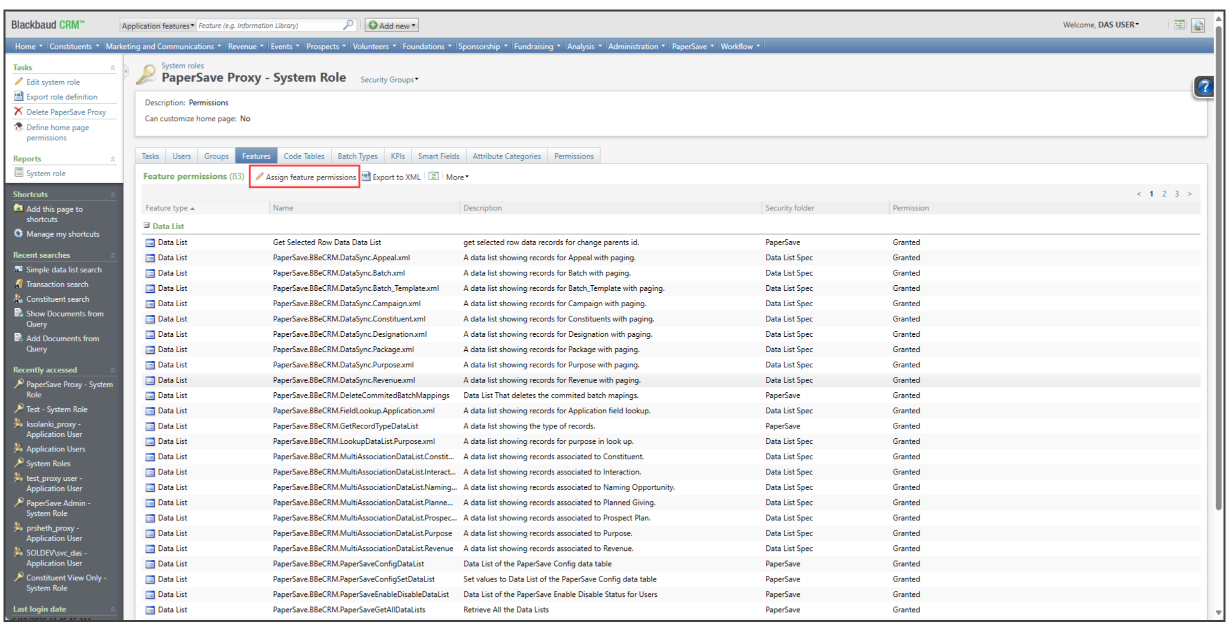


5) Now, click on the **Save** button.

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.

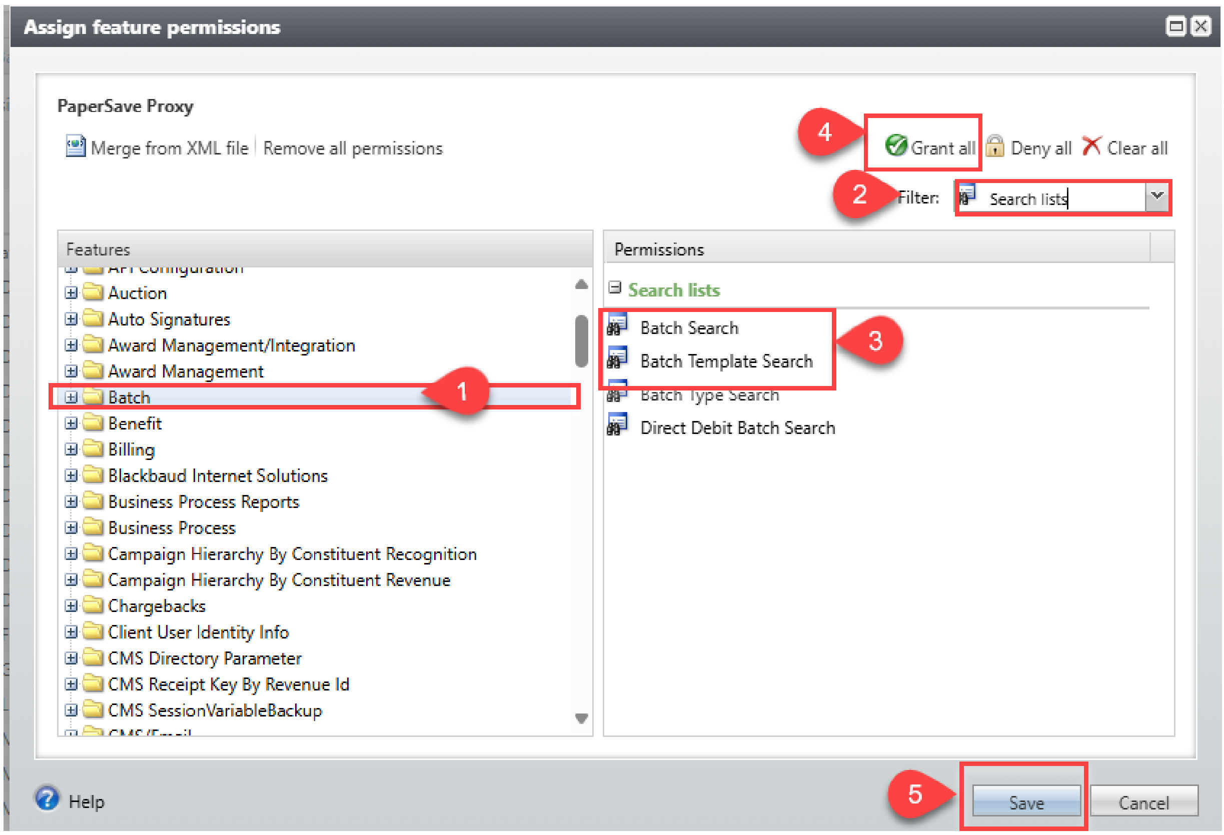


8) Now, assign the feature permissions as shown in the table below.

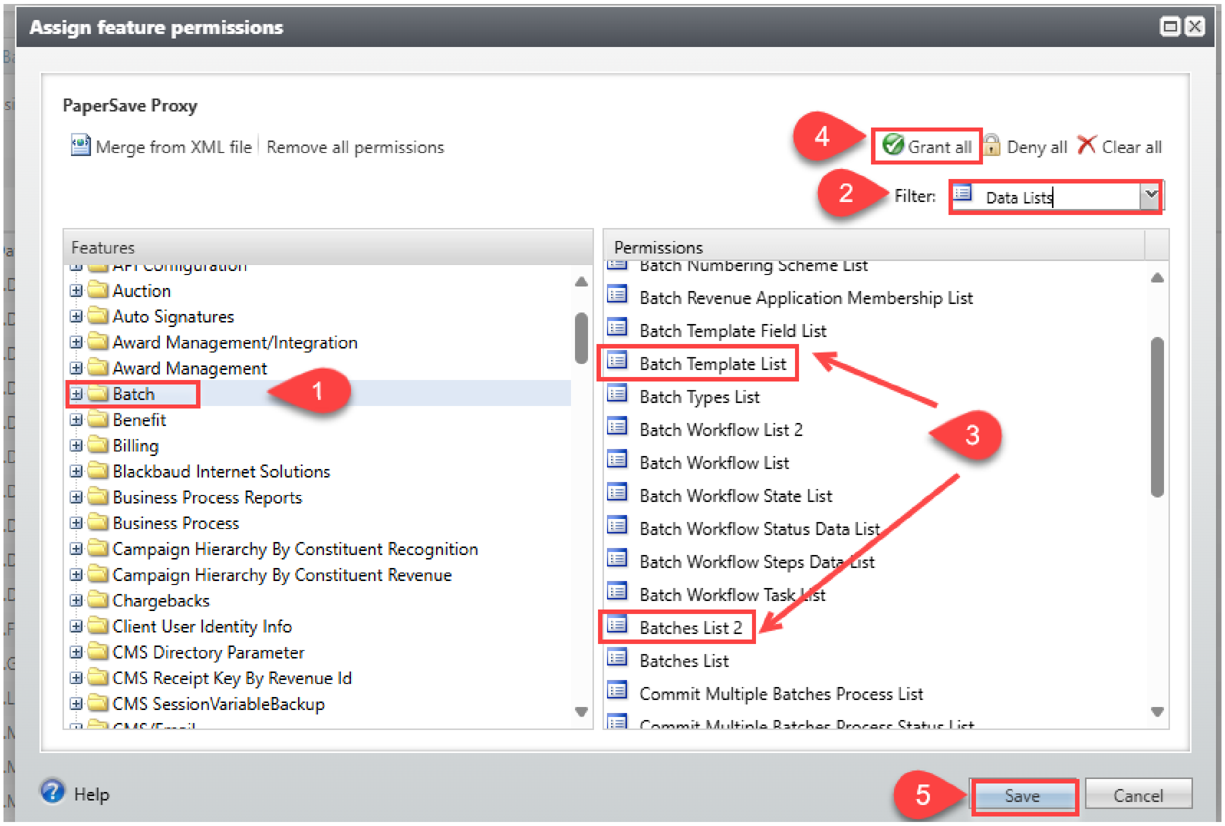
Features		Permissions	
Batch		Search Lists	Batch Search
			Batch Template Search
		Data lists	Batch Template list
			Batches List 2
		Add Forms	Batch Add Form 2
Configuration	Attributes	Data lists	Attribute category list
Constituent		Search Lists	Constituent Search
Data List Spec		Data lists	Select all 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

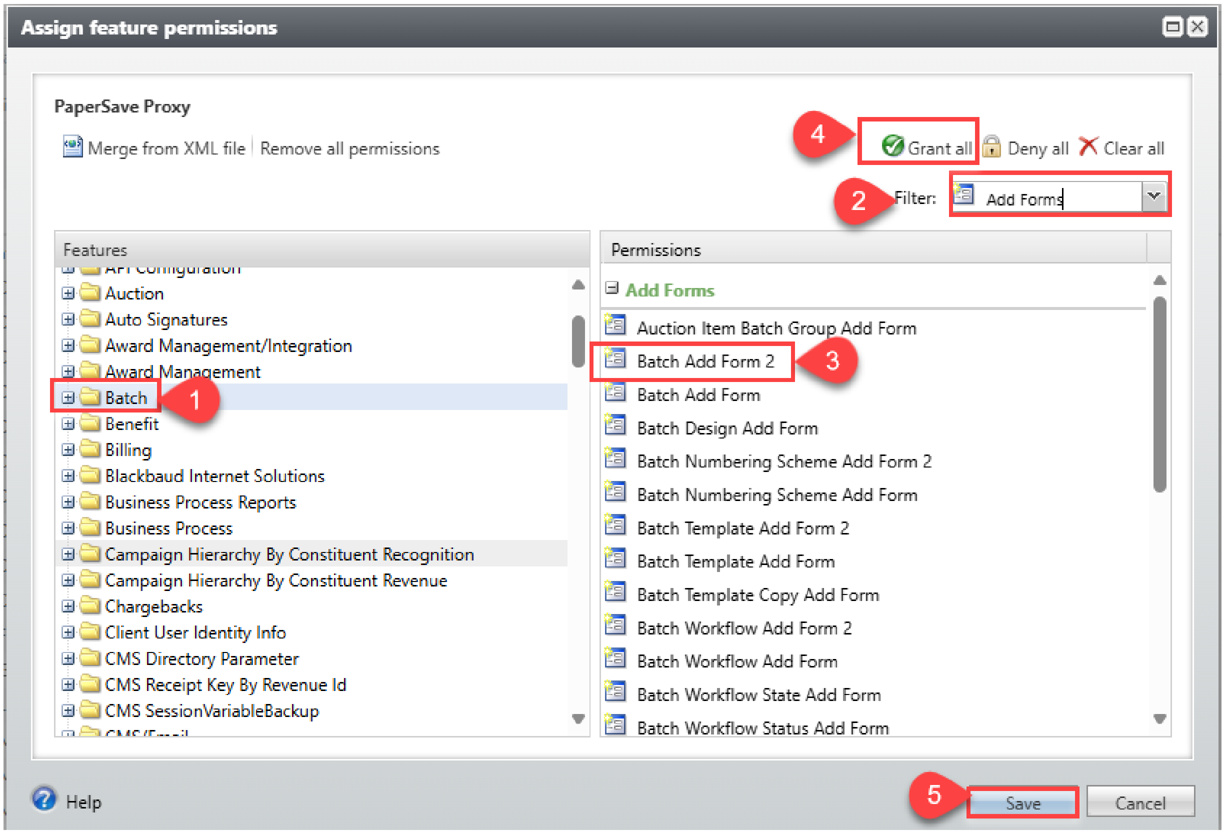
- select the Batch Search, Batch Template Search from Batch(feature) and click on the grant all and then save it.



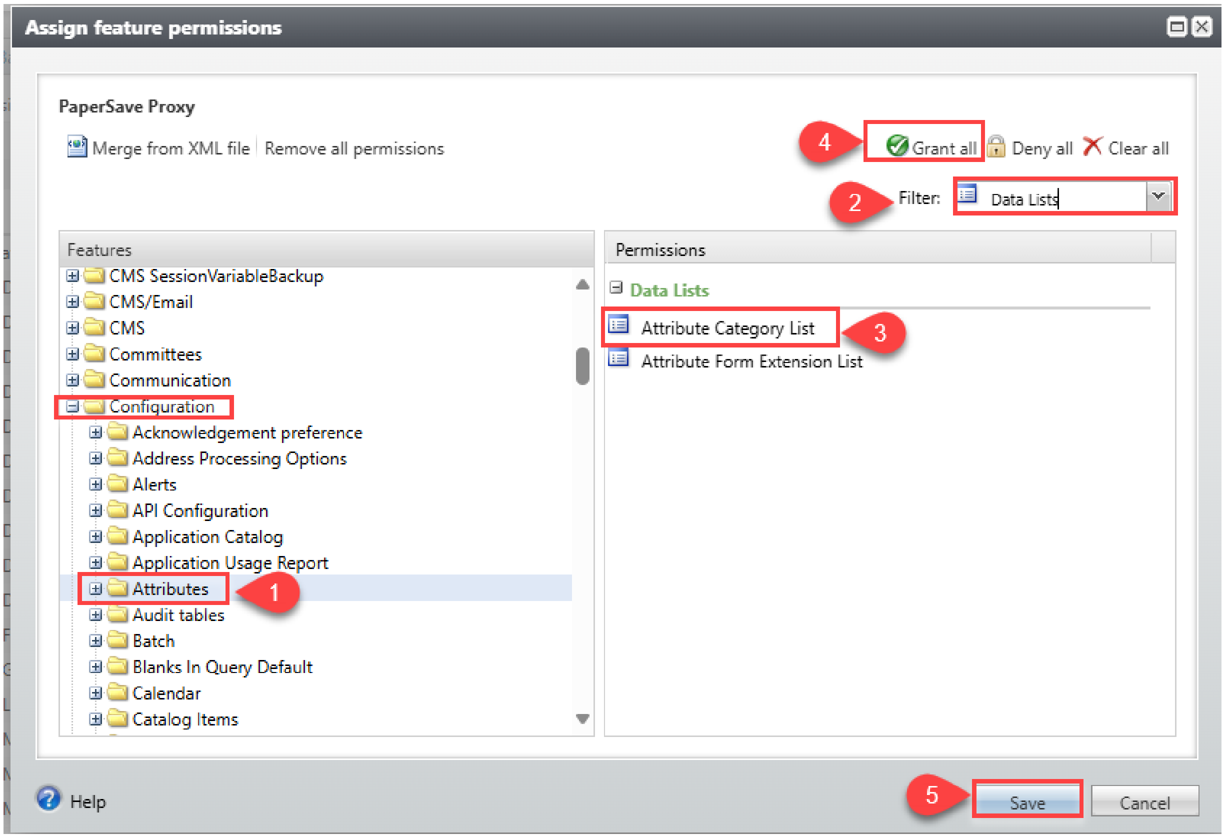
- select the Batch List 2, Batch Template List from Batch(feature) and click on the grant all and then save it.



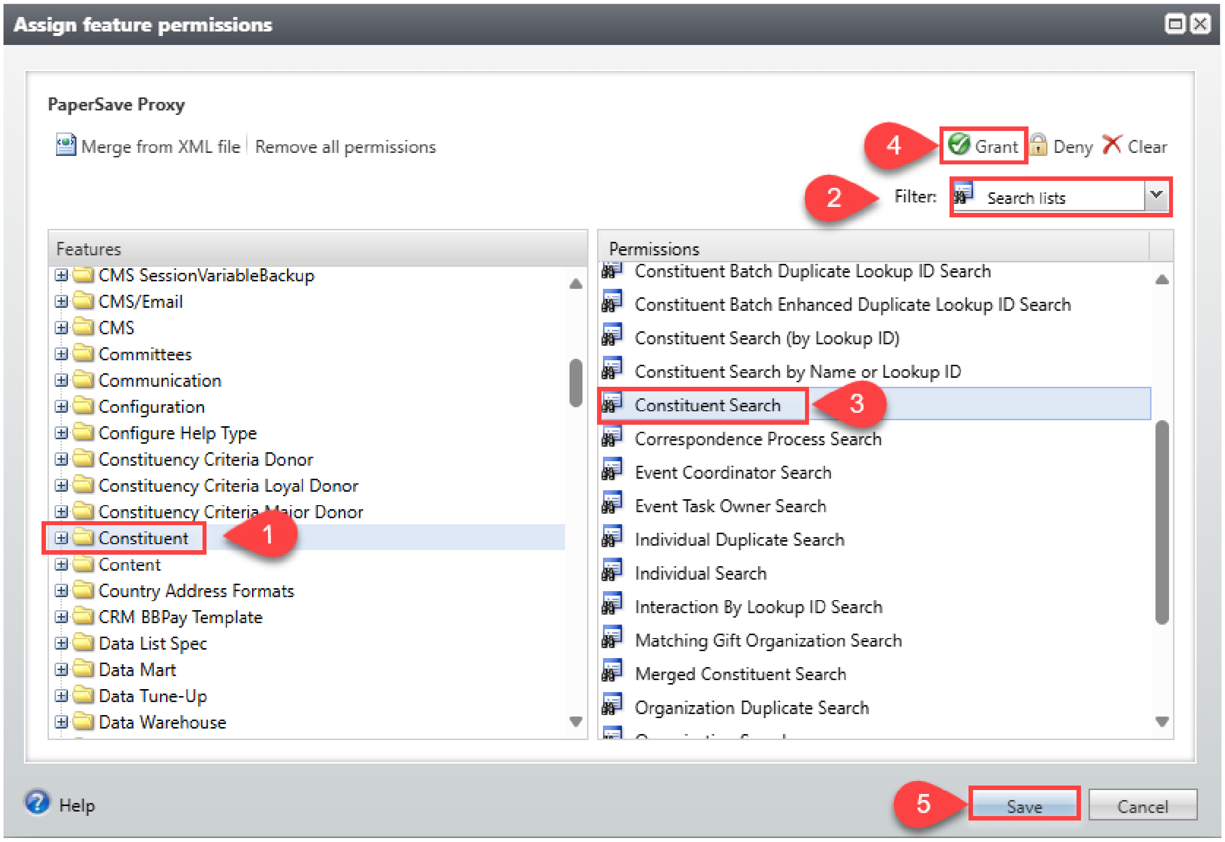
- select the Batch Add Form 2 from Batch(feature) and click on the grant all and then save it.



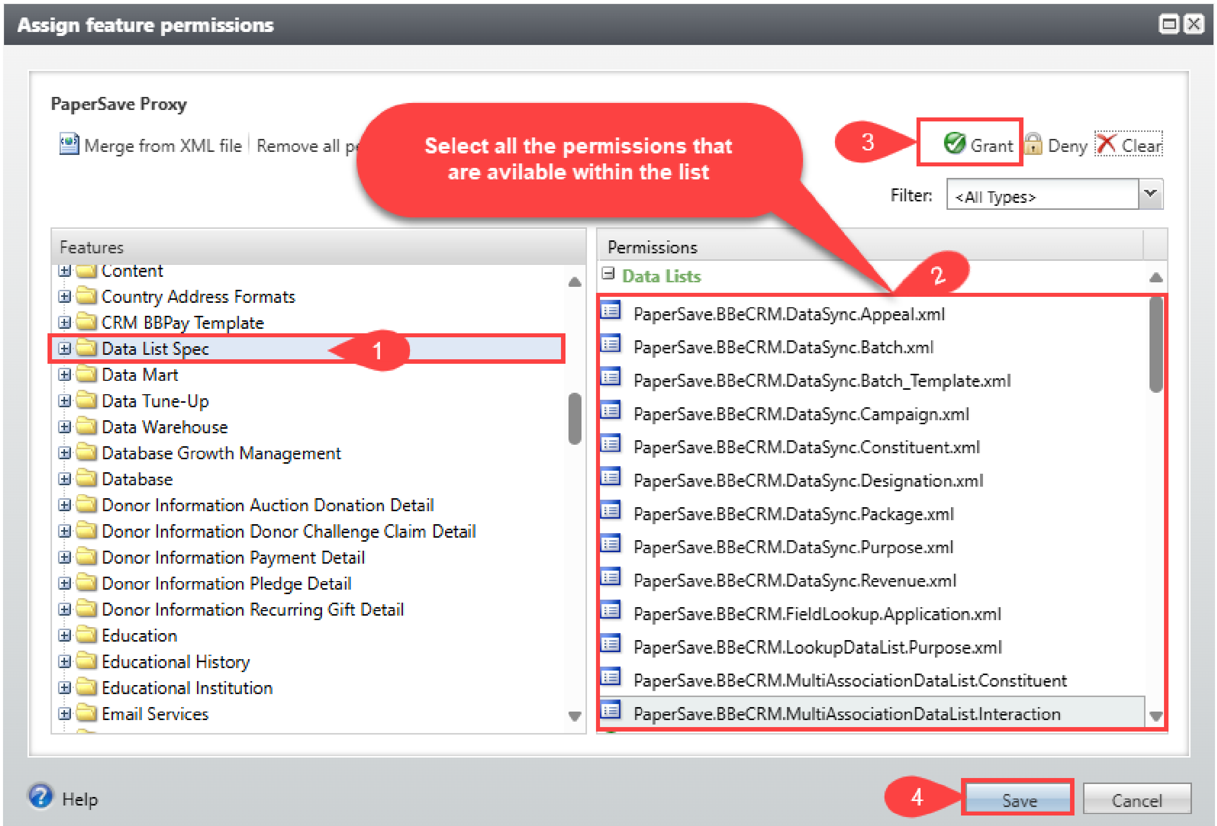
- select the Attribute category List from Attributes under the Configuration (feature) and click on Grant all and then save it.



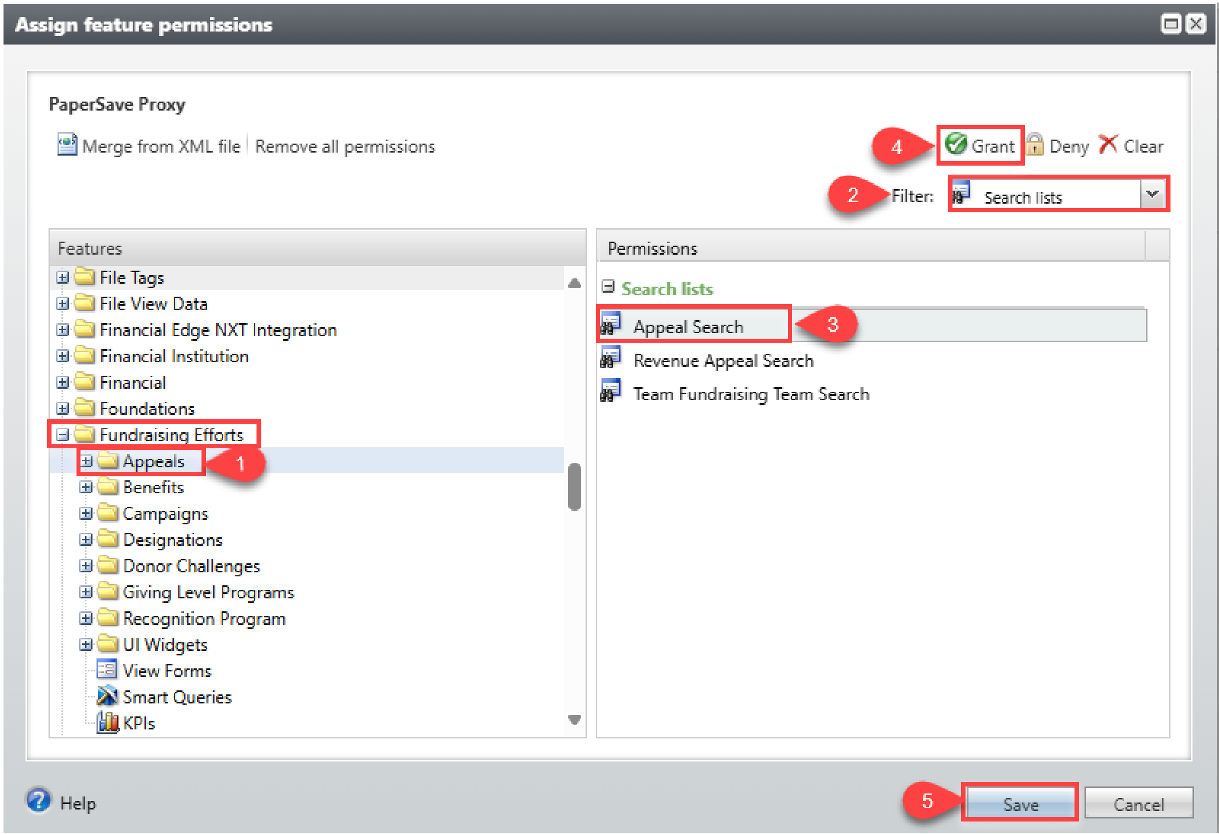
- select the Constituent Search from Constituent (feature) and click on Grant all and then save it.



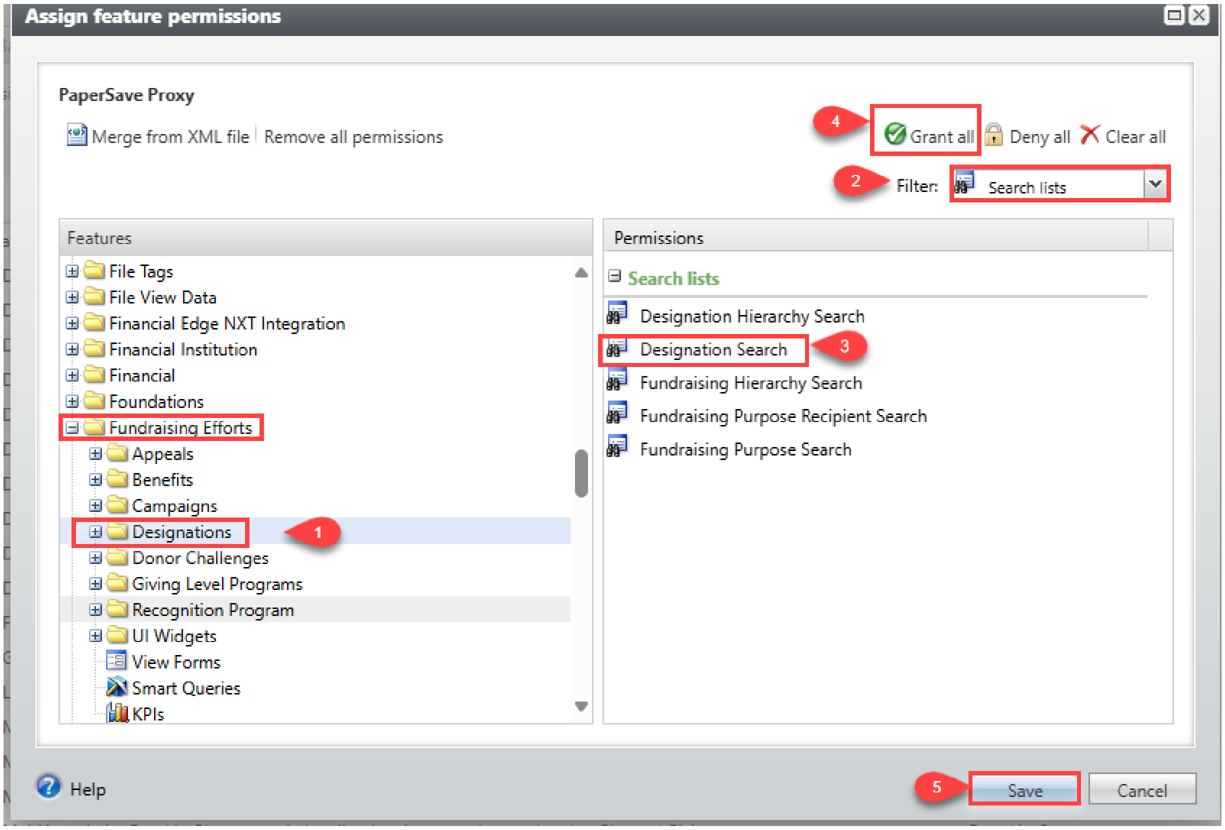
- select all the permissions that are available in the Data List Spec (feature) and click on Grant all and then save it.



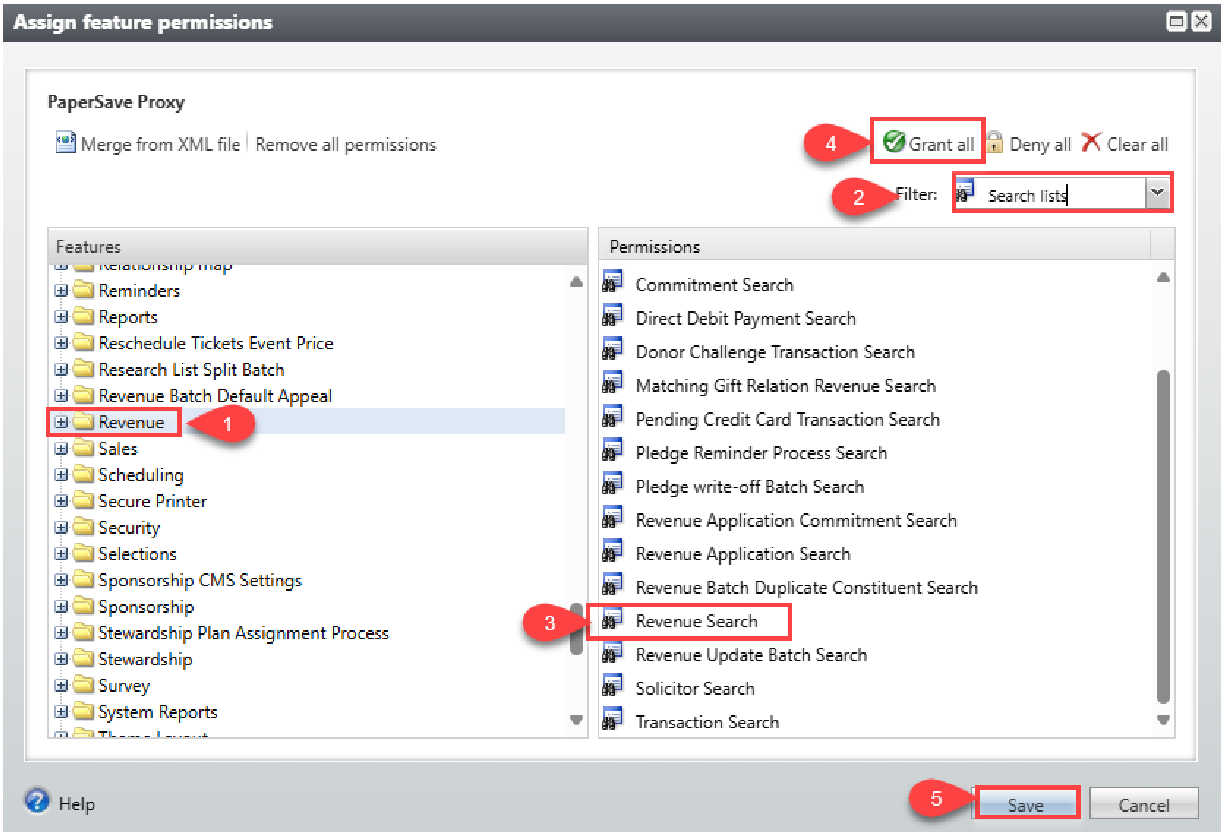
- select the Appeal Search from Appeals under the Fundraising Efforts (feature) and click on Grant all and then save it.



- 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.